

# State of Tech & Durables

Weekly trends and insights for  
the tech and durables market

Edition 230  
Week 45 of 2024  
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**NielsenIQ**



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### Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

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# Fact of the Week

*All product categories are lagging YTD except Ovenware and Thermo Pots*

After peaking during the pandemic, volume demand is still far from recovery

## About gfknewron

### Fact of the week

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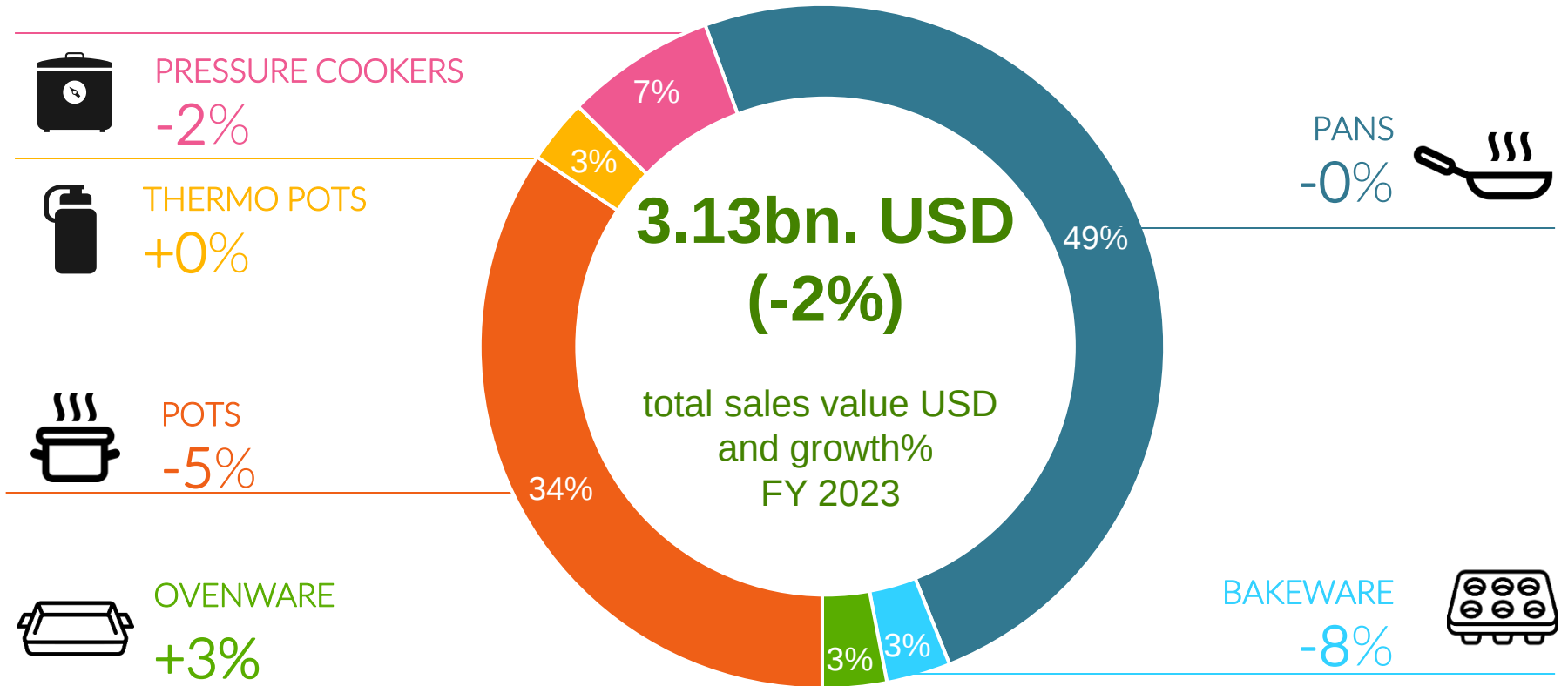
Spain

Japan

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China

Cookware Structure | Sales Value USD, Sales Value Share, Growth rate PY | January – December 2023



# Weekly retail insights from the Point of Sale

## Spotlight on Germany

About **gfknewron**

Fact of the week

**Germany**

Great Britain

France

Italy

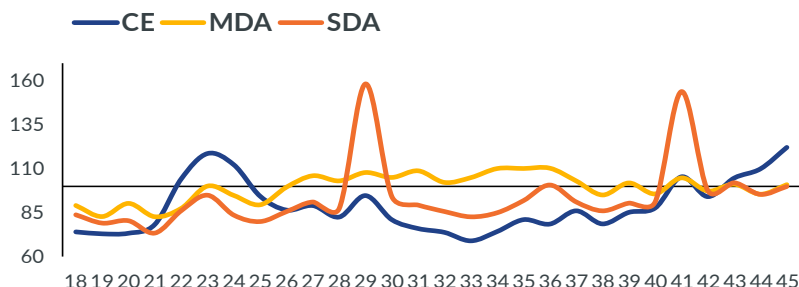
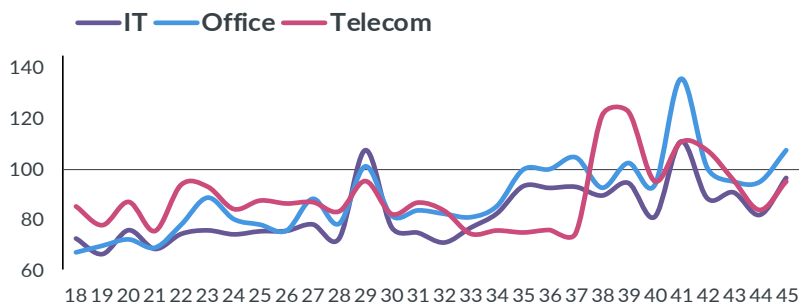
Spain

Japan

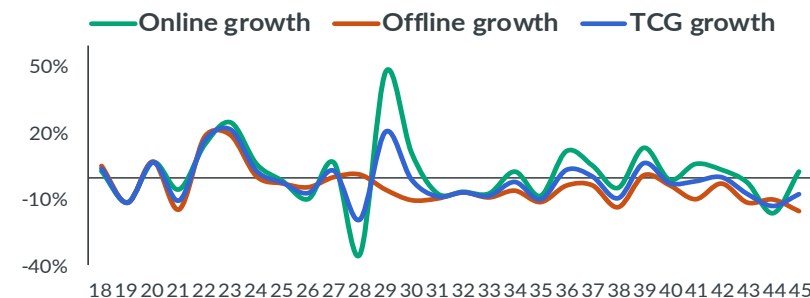
Brazil

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 45 (Nov 04– Nov 10)

- While online sales recovered from last week, posting +3% in week 45, traditional retail lost 15%, dragging the total TCG market down by 7%.
- IT/office presented a mixed performance with laser printers and monitors at +20% and +19%. At the other end of the scale desk computing and mobile computing were at -11% and -10% respectively. Smartphones slumped at -16%.
- Soundbars posted an outstanding +40% while audio home systems delivered -17%. PTV were at +4%. MDA/SDA experienced moderate ups and downs.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 45 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

About **gfknewron**

Fact of the week

Germany

**Great Britain**

France

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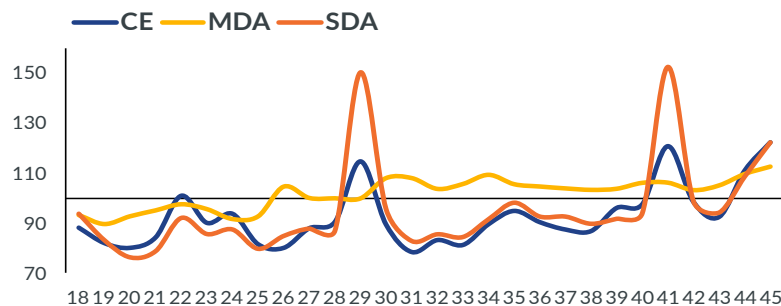
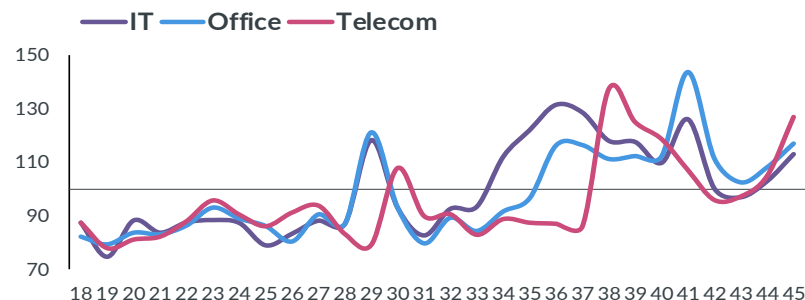
Spain

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 45 (Nov 04– Nov 10)

- Online sales accelerated at +9%, pulling the total TCG market up by 6%. Traditional retail added to it, at +1%.
- Except for media tablets at -14% and mobile computing at -7%, all other IT/office products delivered growth, with laser printers leading at +18%. Smartphones accelerated at +17%.
- While audio home systems suffered at -37%, PTV were hit less, at -6%. Soundbars were flat. Dental care was the leading category in MDAs/SDAs, at +30%. Shavers and hot beverage makers grew in double-digits as well. Vacuum cleaners were the only declining category, at -5%.



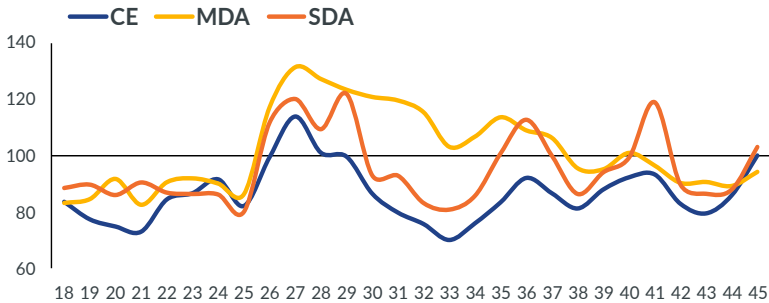
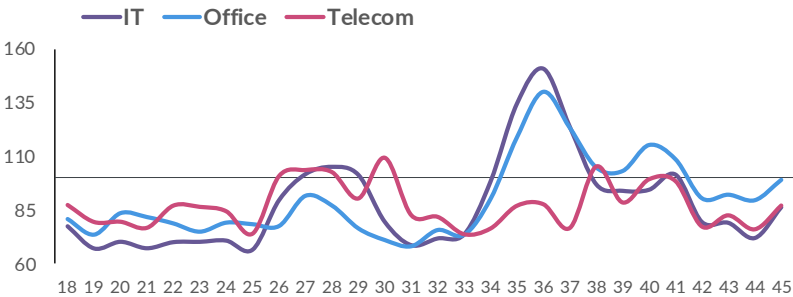
SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 45 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet 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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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 45 (Nov 04– Nov 10)

- At close rates of +9% and +7%, both online sales and traditional retail lifted the total TCG market to a plus of +8%.
- Except for mice at a slight -1%, IT/office products delivered growth, ranging from +1% for keyboards to a remarkable +41% for laser printers. Smartphones were weak at +1%.
- Within MDAs/SDAs, only food preparation declined, at -16%. Vacuum cleaners accelerated at +22% and air treatment was up 20%. Soundbars and PTVs were double-digit positive as well. Audio home systems decelerated at -18%.



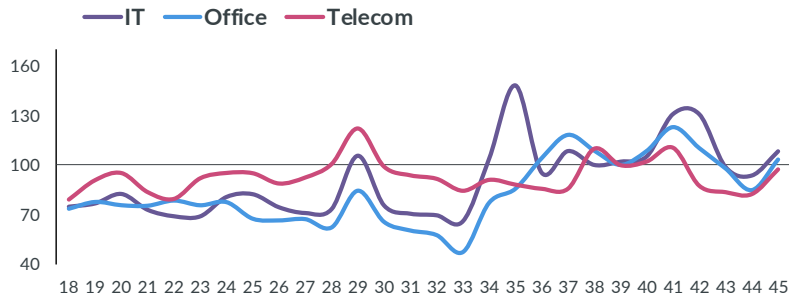
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 45 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

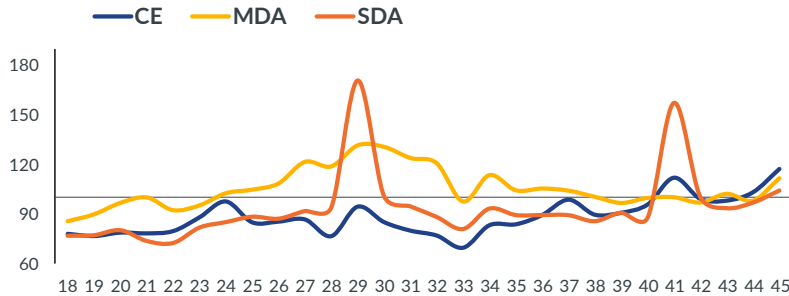
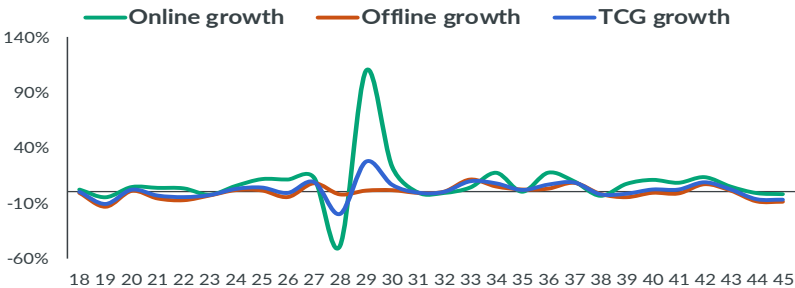
## Spotlight on Italy

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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 45 (Nov 04– Nov 10)

- Traditional retail at -9% dragged the total TCG market down by 7%. Online sales at -2% added to it.
- While desk computing increased by 9%, mobile computing lost 11%. Smartphones fell in double-digits too, at -10%.
- MDAs/SDAs delivered a mixed picture with air treatment leading at +37% and food preparation coming in last at -46%. The other categories posted moderate gains and losses. CE segments were negative throughout, with audio home systems leading at -29%. PTVs were down 10%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 45 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

About **gfknewron**

Fact of the week

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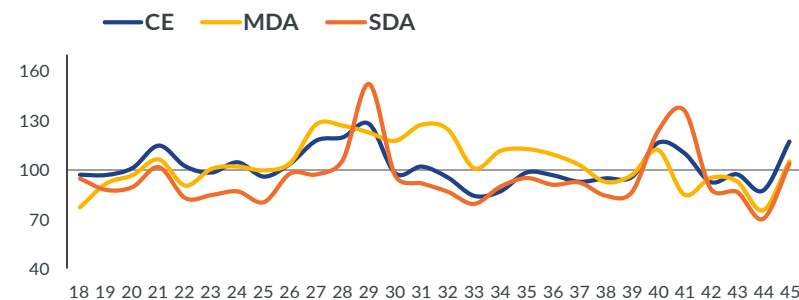
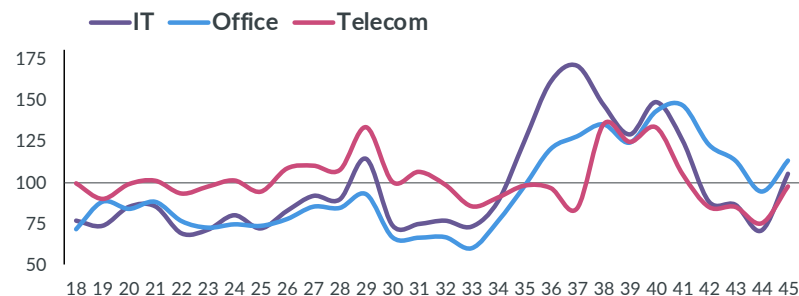
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Japan

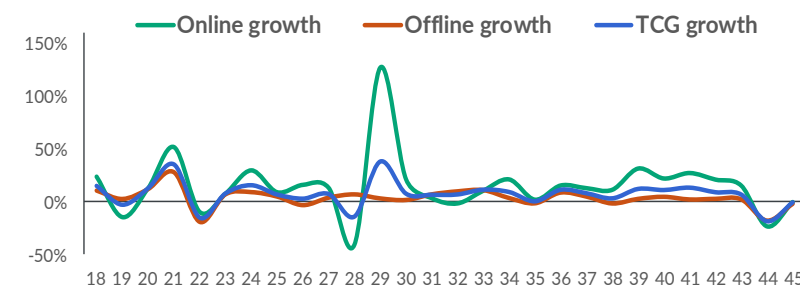
Brazil

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 45 (Nov 04– Nov 10)

- Flat online sales and traditional retail at just -1% led to a flat total TCG market.
- While laser printers were outstanding at +47%, media tablets and mobile computing delivered -4% and -8%. Smartphones were flat.
- MDAs experienced growth, at +13% for washing machines and +6% for cooling. SDAs were weak at -3% for vacuum cleaners and shavers. Hot beverage makers were flat. CE categories posted declines of -7% for PTVs and -3% for soundbars. Headsets accelerated at +12%.



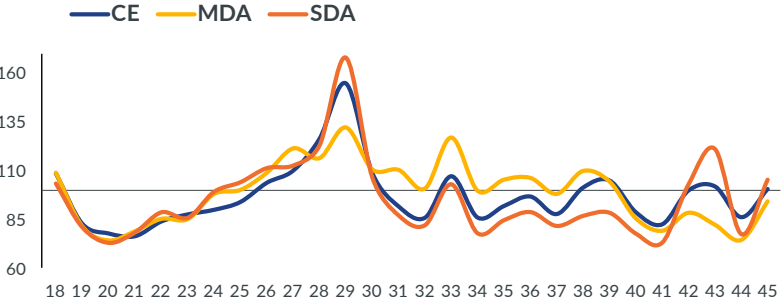
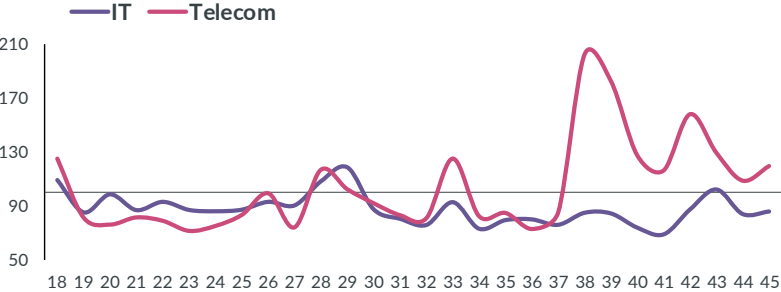
SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 45 2024 (no comparability with 2019); Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (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

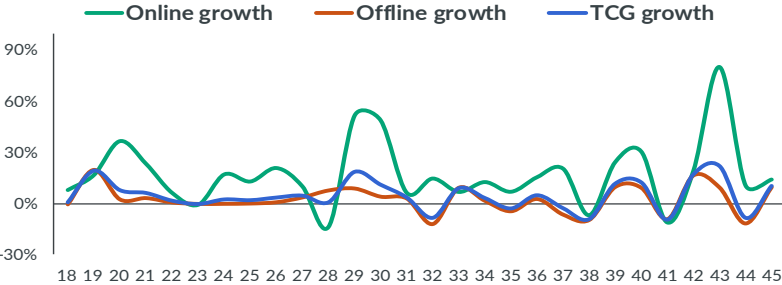
## Spotlight on Japan

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| <b>Japan</b>           |
| 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 45 (Nov 04– Nov 10)

- Recovery of traditional retail, posting +9% in week 45, and good results for online sales (+14%) led to growth of 10% for the total TCG market.
- While media tablets performed well at +34%, mobile computing declined by 1%. Smartphones were boosted, gaining 22%.
- MDAs/SDAs posted growth throughout, with air treatment leading at +34% and shavers at +23%. Vacuum cleaners and cooling were weaker at +5% and +3%. While headsets accelerated at +20%, PTVs and soundbars were down 5%.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 45 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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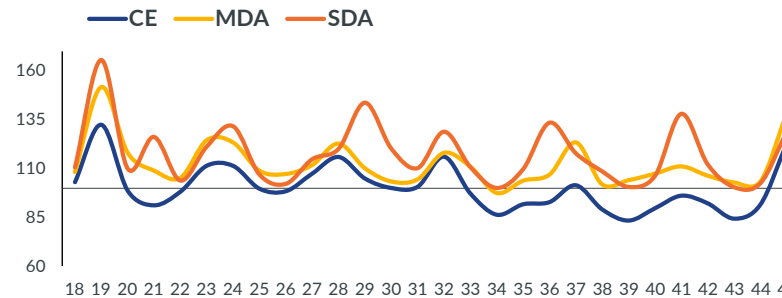
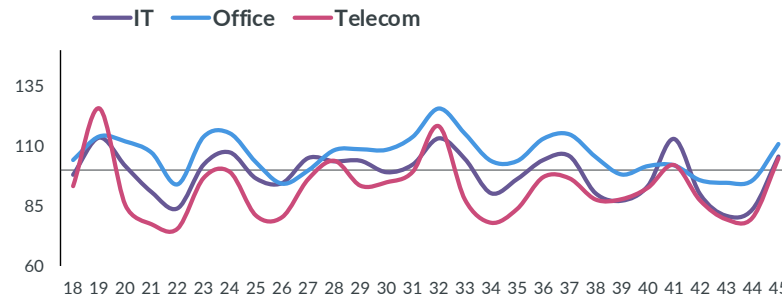
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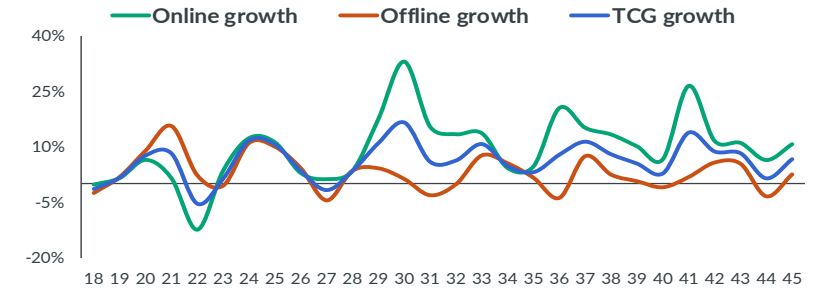
**Brazil**

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 45 (Nov 04– Nov 10)

- An uptick of 11% for online sales brought a plus of 7% to the total TCG market. Traditional retail at +2% added to it.
- IT/office product groups experienced very good results with +29% for desk computing and +27% for laser printers. Media tablets slumped at -14%. Smartphones were down 1%.
- CE and MDAs/SDAs reported growth throughout. The leading category was vacuum cleaners at +36%. Audio home systems were second at +30%. Washing machines came in third, at +26%. PTVs were the weakest category, at +2%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 45 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 – 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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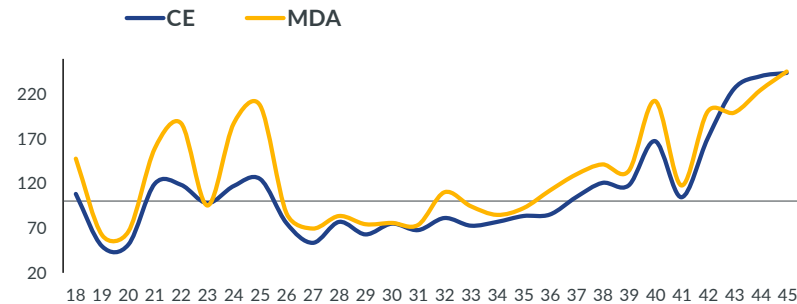
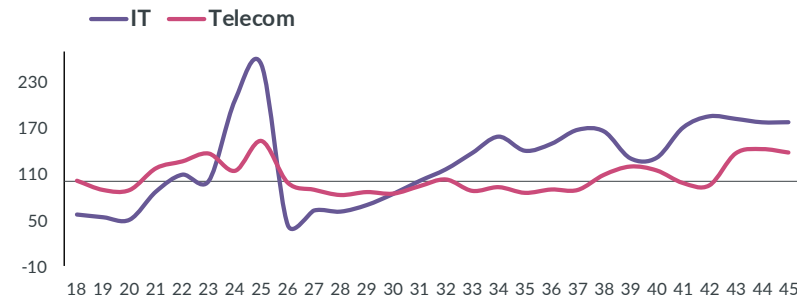
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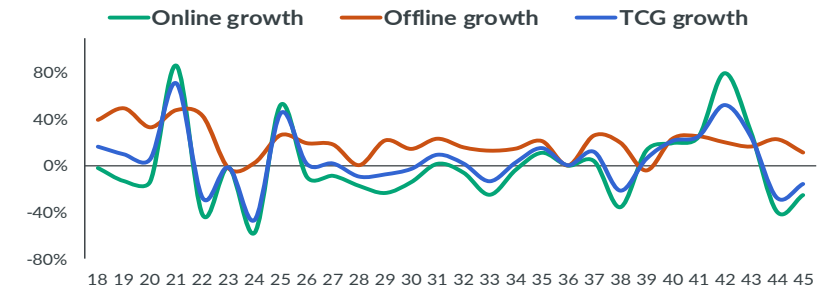
Brazil

**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 45 (Nov 04– Nov 10)

- A drop of -25% for online sales brought the total TCG market to a minus of 16%. Traditional retail at +11% was unable to compensate for the decline. The sharp decline in sales in the last two weeks versus the same weeks in 2023 can be attributed to the earlier start of the 11.11 promotion in 2024, thus purchases were made earlier than normal.
- The fall was driven by smartphones at -21%, due to their high share in the product group basket.
- PTV delivered the highest loss, at -23%. Cooling at -7% and washing machines at -3% were hit less.

SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 45 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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