

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 229
Week 44 of 2024
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NielsenIQ



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Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China



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Fact of the Week

Relevant use cases are key to achieve mass market adoption

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GfK Panelmarket | TCG | EU13 | Sales Units %

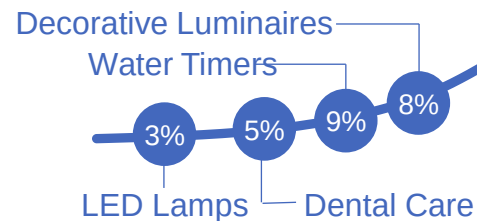


Industry push

Consumer pull



EARLY
ADOPTER
MARKET



MASS
MARKET

Weekly retail insights from the Point of Sale

Spotlight on Germany

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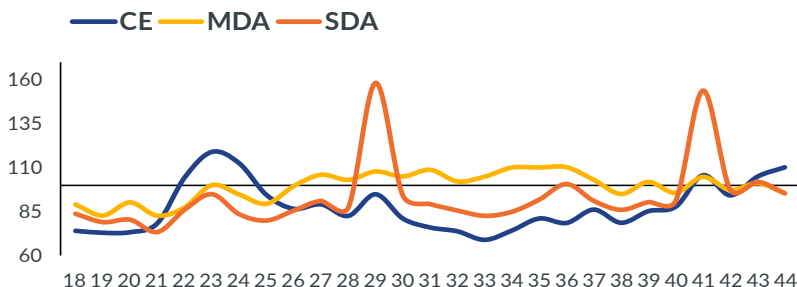
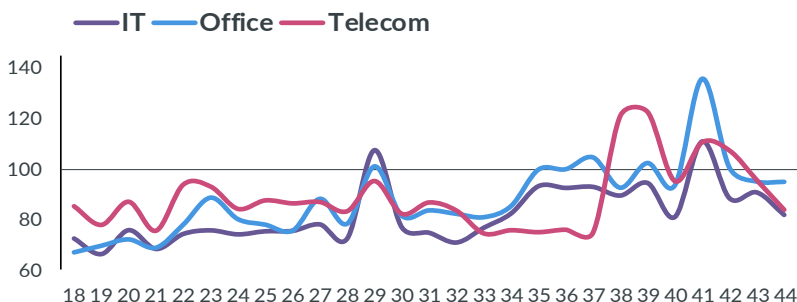
Spain

Japan

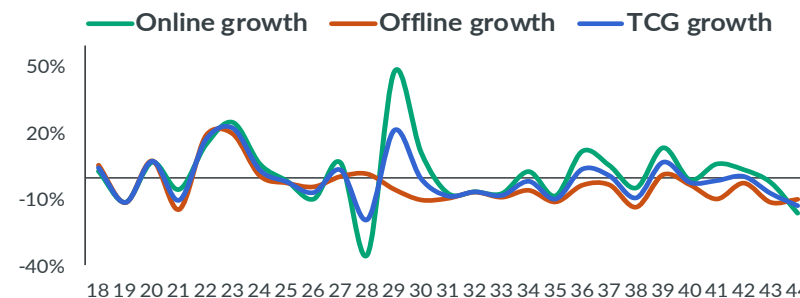
Brazil

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 44 (Oct 28– Nov 03)

- Online sales at -16% and traditional retail at -10% led to a deceleration of 13% for the total TCG market.
- Except for monitors (+3%) and laser printers (+8%), all other IT/office categories posted moderate downswings with desk computing in front at -10%. Smartphones slumped at -20%.
- CE categories were double-digit negative with audio home systems in the lead at -28% and PTVs decreasing by 11%. Air treatment and food preparation also suffered, posting -24% and -18% respectively. Shavers and hot beverage makers experienced upticks of 9% and 3%.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 44 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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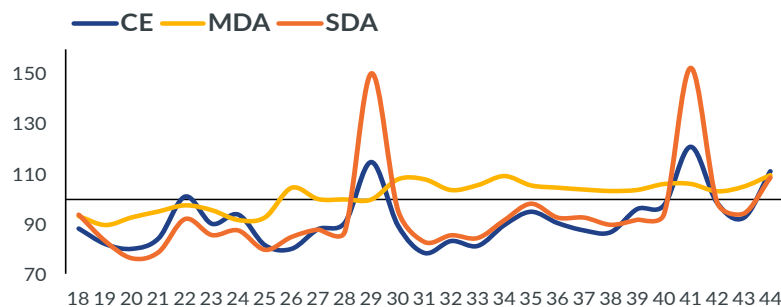
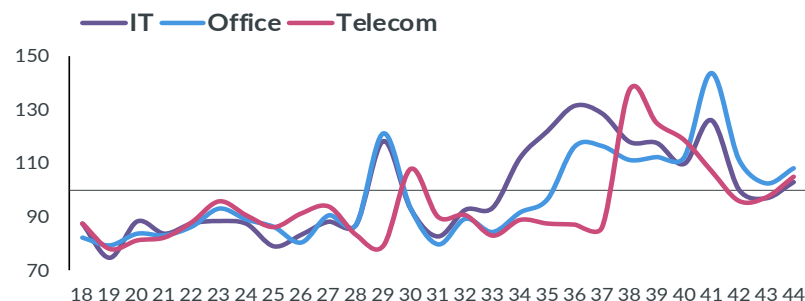
Spain

Japan

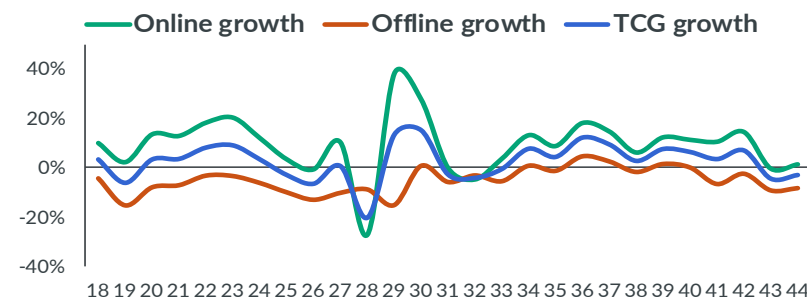
Brazil

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 44 (Oct 28– Nov 03)

- Traditional retail decreased by 8%, leading to a downswing of 3% for the total TCG market. Online sales at a slight +1% was unable to that balance out.
- IT/office products were led by laser printers at +33%. There was also double-digit rise for monitors and media tablets. Smartphones decelerated at -5%.
- While soundbars grew by 13%, PTVs posted -8%, and audio home systems suffered at -26%. Dental care was the leading category in MDAs/SDAs, at +19%. Vacuum cleaners declined at -10% and washing machines were down 3%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 44 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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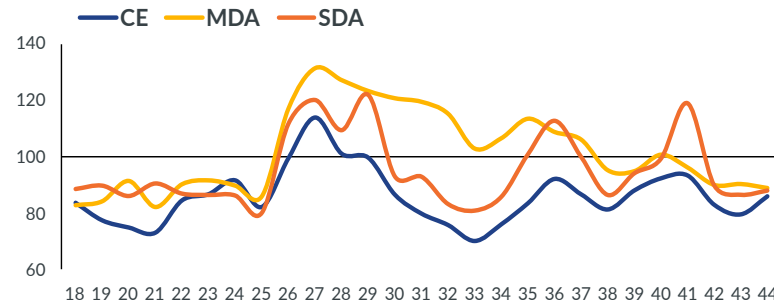
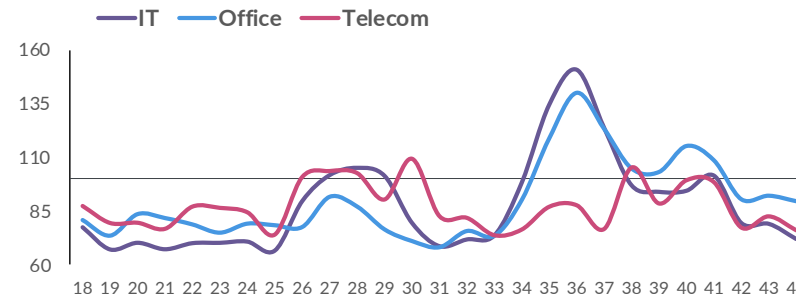
Spain

Japan

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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 44 (Oct 28– Nov 03)

- Traditional retail delivered -7%. Combined with online sales at -3% this resulted in -6% for the total TCG market.
- IT/office products delivered an overall negative picture with laser printers out in front at +45% and desk computing at the other end of the scale, at -24%. Smartphones lagged at -8%.
- While air treatment and hot beverage makers lagged at -13% and -11%, the other SDAs posted moderate positive scores with vacuum cleaners leading at +12%. MDAs were flat. CE categories were double-digit negative, with PTV posting -14%. Only headsets were positive at +6%.



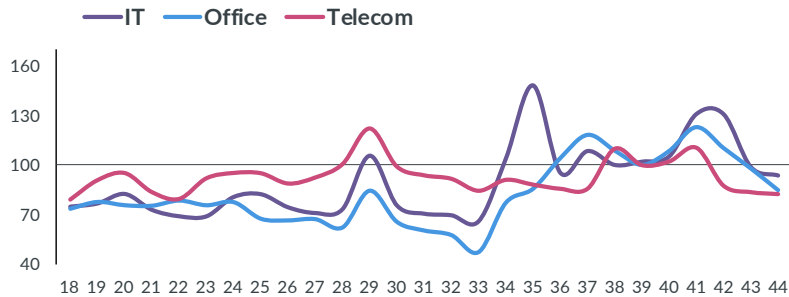
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 44 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

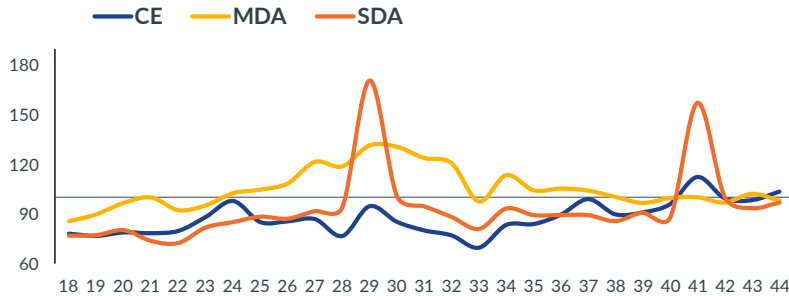
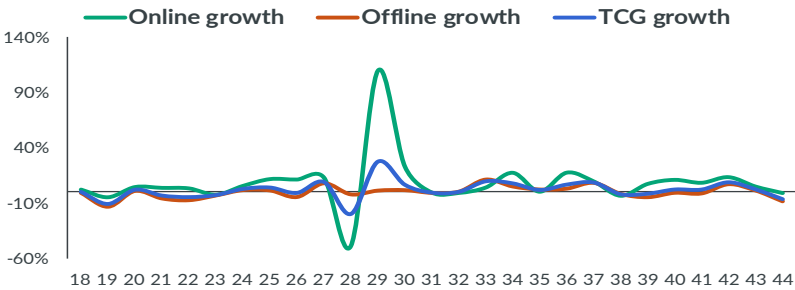
Spotlight on Italy

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



Key take aways in calendar week 44 (Oct 28– Nov 03)

- Traditional retail at -8% dragged the total TCG market down by 7%. Online sales at -1% added to it.
- Except for media tablets at +5%, IT/office products delivered negative trends ranging from -5% for mobile computing to -21% for laser printers. Smartphones were down 18%.
- MDAs/SDAs delivered a mixed picture with air treatment leading at +45% and food preparation last at -7%. Soundbars experienced a plus of 3% while audio home systems dropped by 15% and PTVs were down 4%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 44 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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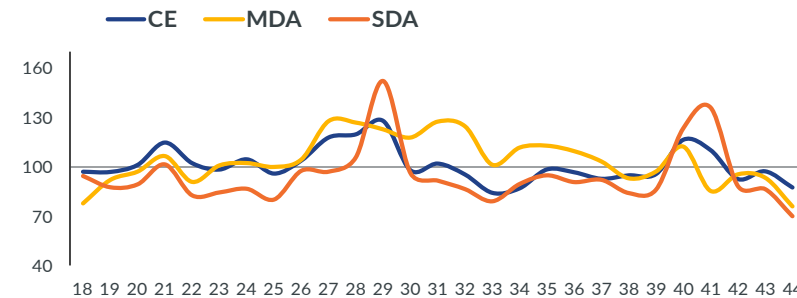
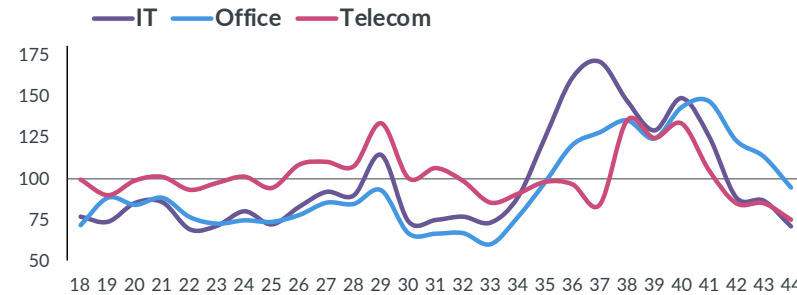
Spain

Japan

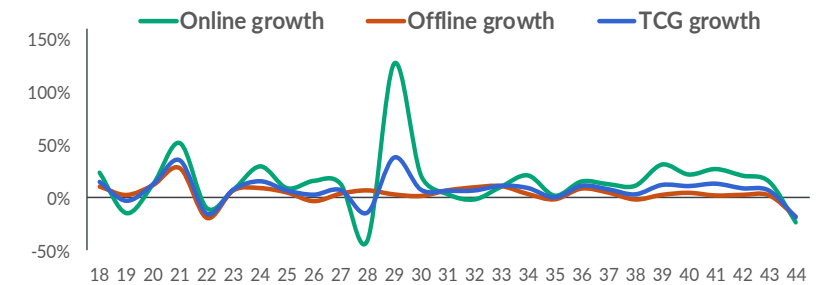
Brazil

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 44 (Oct 28– Nov 03)

- The long weekend over All Saints Day could be one of the reasons for the strong decline of online sales (-22%) and traditional retail (-17%), depressing TCG by 19%.
- While laser printers was the category hit the least in week 44, at -1%, mobile computing dropped by 25%, and media tablets by 15%. Smartphones lost 20%.
- Except for washing machines at -6%, all other MDA/SDA categories delivered notable double-digit negative trends with vacuum cleaners leading at -25%. Audio home systems were the worst-performing segment at -30%. PTVs suffered at -23%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 44 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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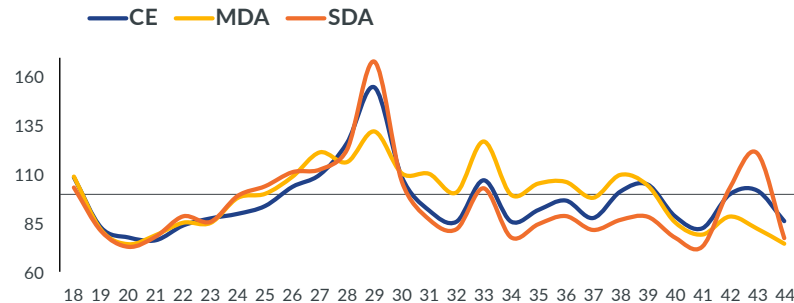
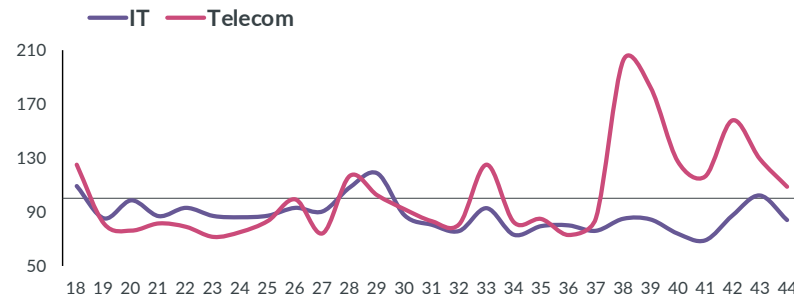
Spain

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 44 (Oct 28– Nov 03)

- Traditional retail at -12% dragged the total TCG market down by 9%. Online at a good +10% could not balance that out.
- While media tablets performed well at +14%, mobile computing declined by 7%. Smartphones lagged at -6%.
- CE and MDA categories posted negative trends throughout with PTV down at -13% and cooling delivering -14%. Headsets were hit the least, at -1%. SDAs delivered a mixed performance from -19% for vacuum cleaners to +10% for food preparation.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 44 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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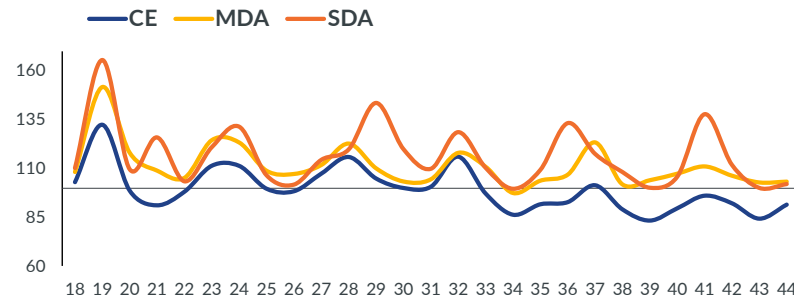
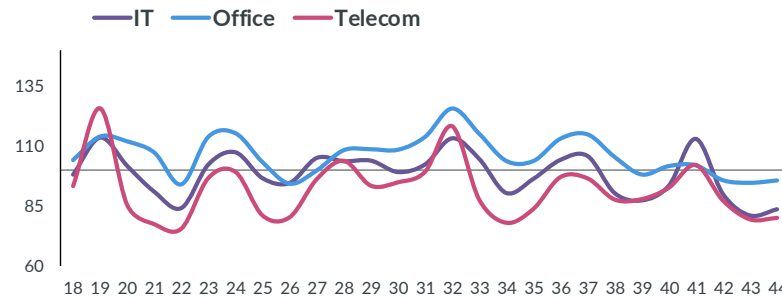
Spain

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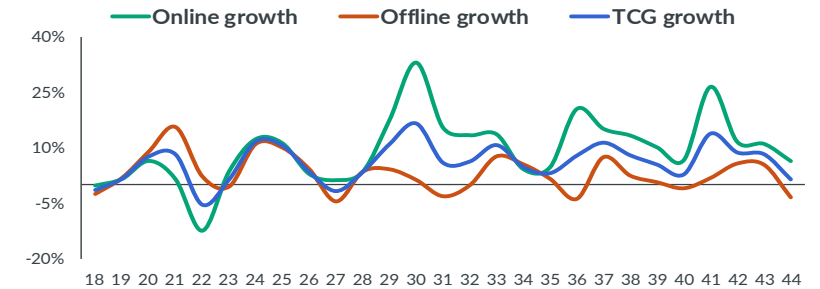
Brazil

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 44 (Oct 28– Nov 03)

- A plus of 6% for online sales brought a slight +1% to the total TCG market. Traditional retail at -4% did not cloud this result.
- IT/office product groups experienced very good results with +56% for laser printers and +34% for desk computing. Media tablets lagged at -5%, as did smartphones.
- Except for PTVs at -4%, CE and MDAs/SDAs reported growth, ranging from +4% for food preparation to +39% for vacuum cleaners.



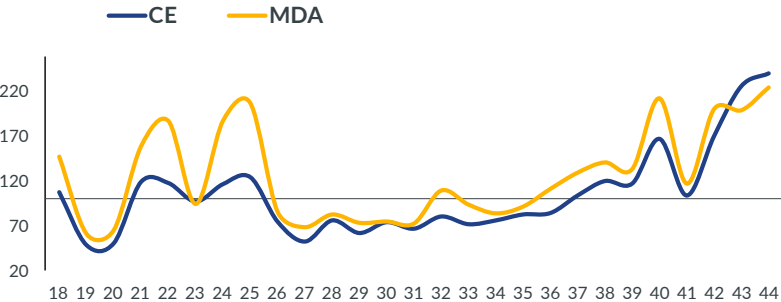
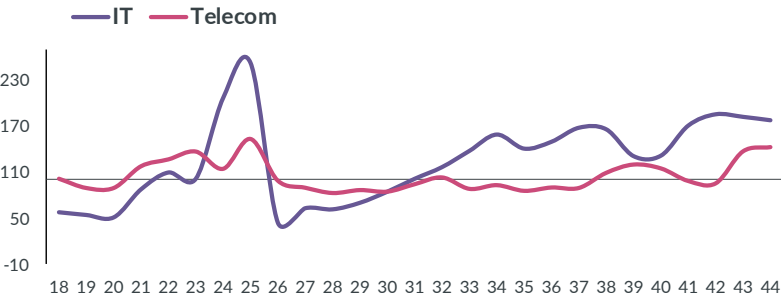
SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 44 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

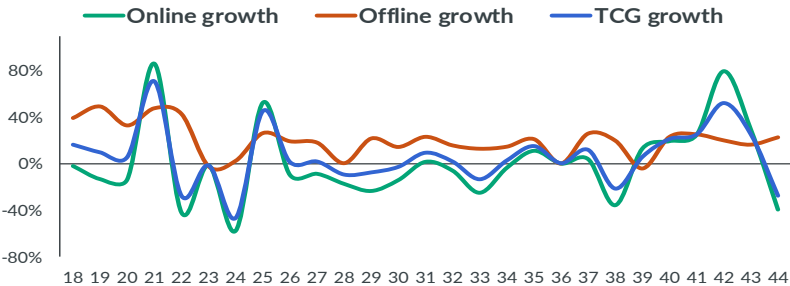
Spotlight on China

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



Key take aways in calendar week 44 (Oct 28– Nov 03)

- A remarkable drop of -39% for online sales brought the total TCG market to a minus of 28%. Traditional retail at +23% was unable to compensate for the decline.
- This fall was driven by all product groups in scope. Mobile computing posted -36% and smartphones were down 29%.
- MDAs and PTV were hit less but still close to -20%: PTV -19%, cooling -19%, and washing machines -18%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 44 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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