

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 231
Week 46 of 2024
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Fact of the week

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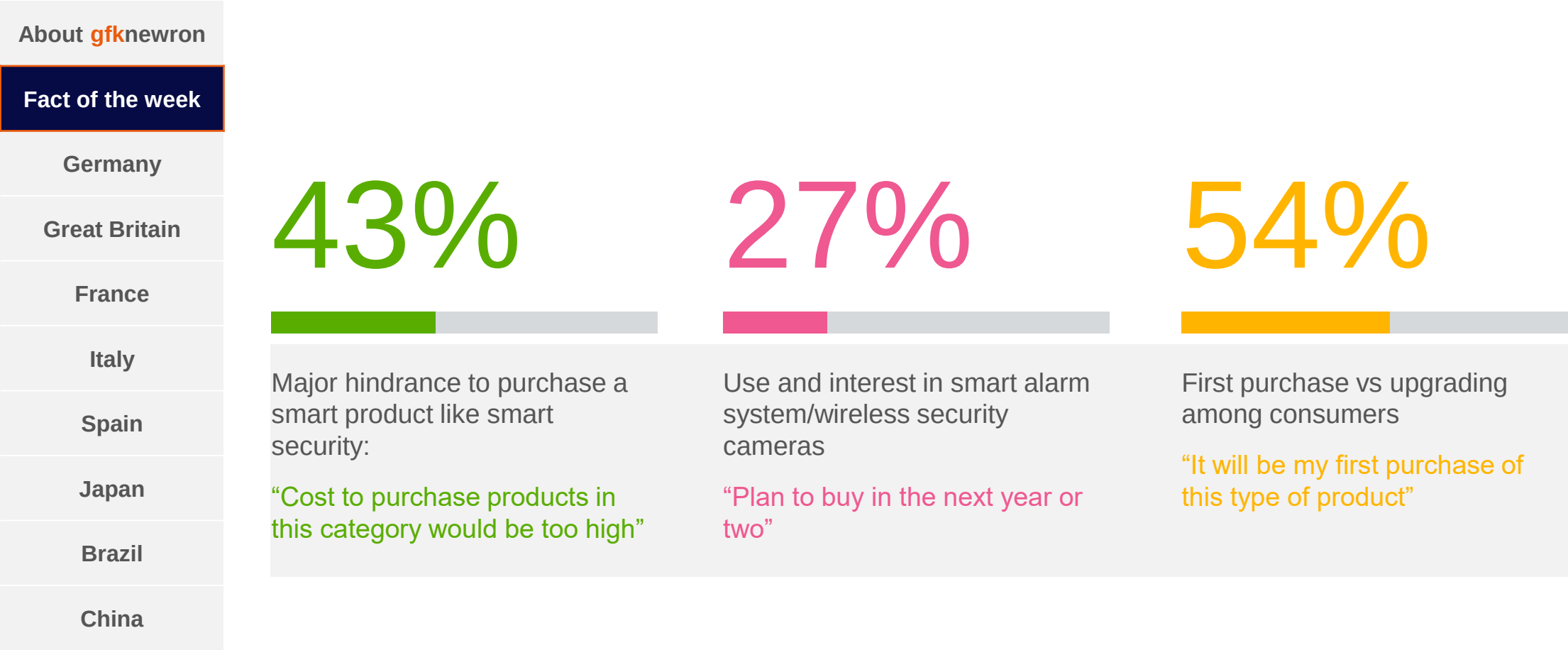
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Accessible across your entire organization, **gfknewron** is a single point of truth for business-critical data. It distills complex market, consumer, and brand intelligence into a clear view of your performance within the market ensuring your strategies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

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Fact of the Week

Consumers attitudes towards smart security



Weekly retail insights from the Point of Sale

Spotlight on Germany

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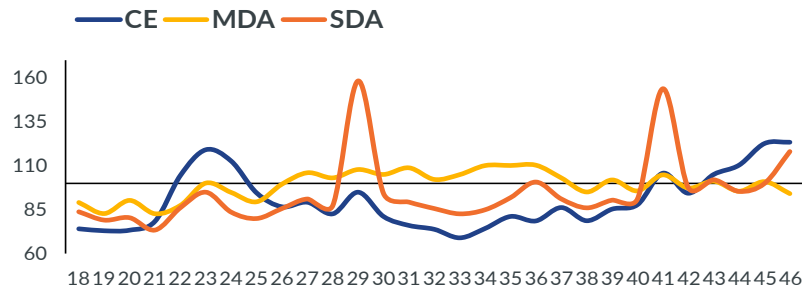
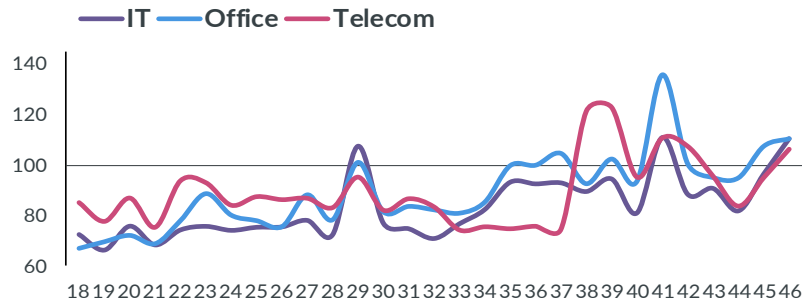
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Japan

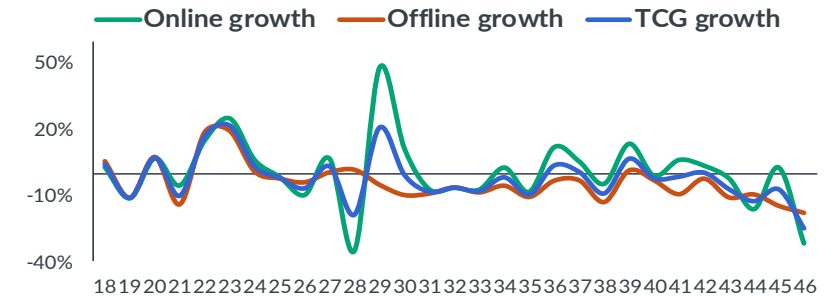
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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 46 (Nov 11– Nov 17)

- The shift of Black Friday by one week impacted pre-Black Friday sales and led to strong drops for online sales (-31%) and traditional retail (-18%) which dragged the total TCG market down by 25%.
- The ray of light in week 46 was laser printers at +21%. Mobile computing and media tablets lost 22% and 10%. Smartphones slumped at -28%.
- CE, MDA, and SDA delivered double-digit deceleration throughout with CE categories presenting the highest losses. Hot beverage makers reported -36%.



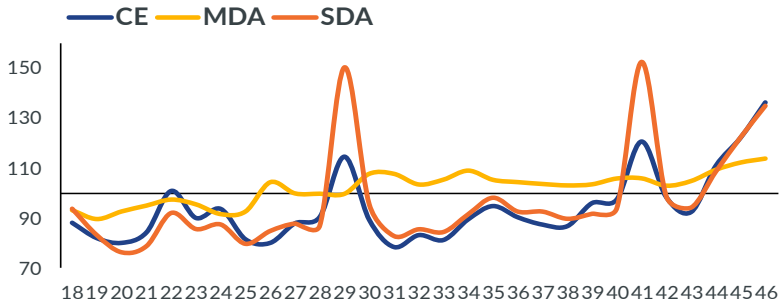
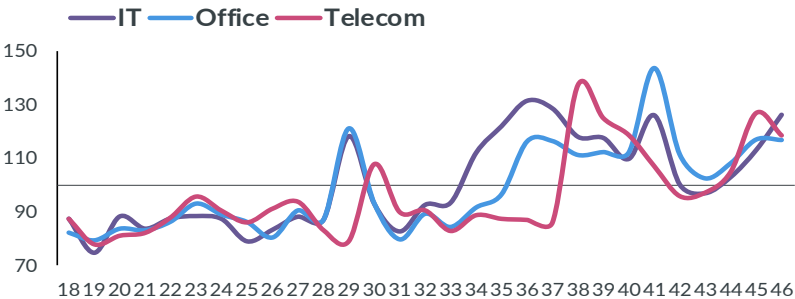
SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 45 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), monitors – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – 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

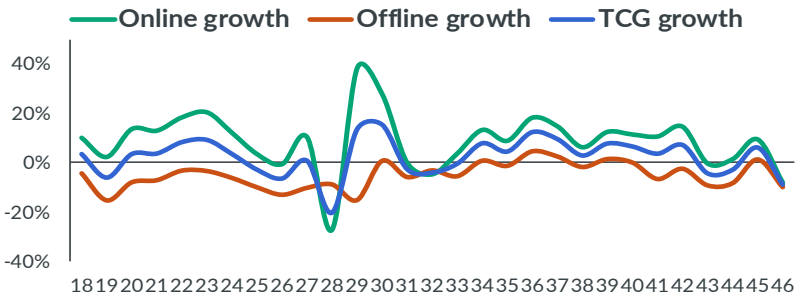
Spotlight on Great Britain

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



Key take aways in calendar week 46 (Nov 11– Nov 17)

- Close rates of -8% for online sales and -10% for traditional retail brought the total TCG market down by 9%.
- Except for printers and desk computing, all other IT/office products declined with media tablets in the lead at -29%. Monitors posted a slight -1%. Smartphones lagged at -4%.
- CE categories declined in high double digits with PTV down 15%. While washing machines grew by 3%, all other MDA and SDA product groups declined moderately, with the highest loss for vacuum cleaners (-12%).



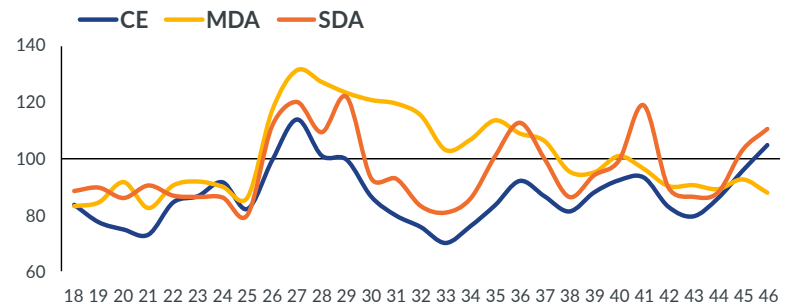
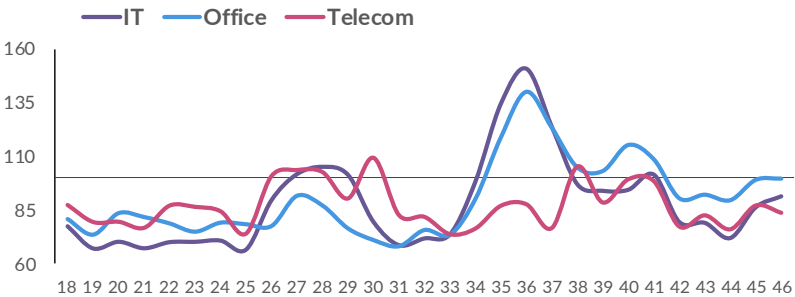
SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 45 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet 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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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 46 (Nov 11– Nov 17)

- At an identical rate of -32%, both traditional retail and online sales retail dragged the total TCG market down by -32%.
- Laser printers delivered an exceptional growth of 46%. In contrast, all other IT/office products declined by 25% or more, with mobile computing at -45%. Smartphones posted -39%.
- Within MDAs/SDAs, only washing machines, air treatment, and dental care posted single-digit declines. Audio home systems were the worst-performing category, delivering -50%. PTVs decelerated by 34%.



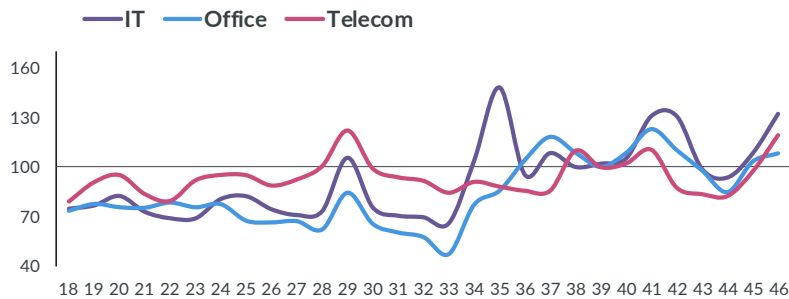
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 45 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers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

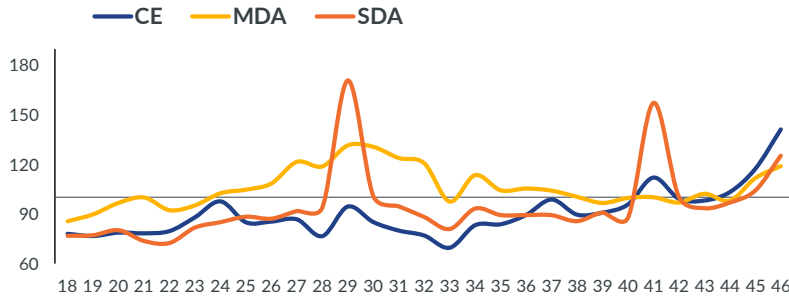
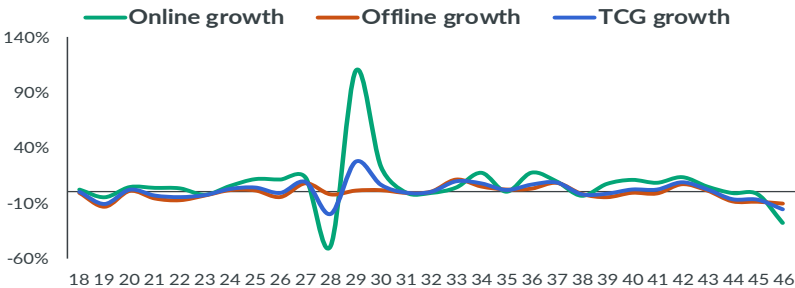
Spotlight on Italy

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



Key take aways in calendar week 46 (Nov 11– Nov 17)

- Online sales at -28% dragged the total TCG market down by 16%. Traditional retail at -10% added to it.
- While desk computing increased by 16%, laser printers declined by 6%. All other IT/office categories were down in double digits. Smartphones slumped at -18%.
- MDAs/SDAs delivered negative trends except for air treatment at +4%. Shavers were the worst-performing category in week 46, at -41%. CE segments were negative throughout, with audio home systems being the worst-performers, at -30%. PTVs fell 12%.



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

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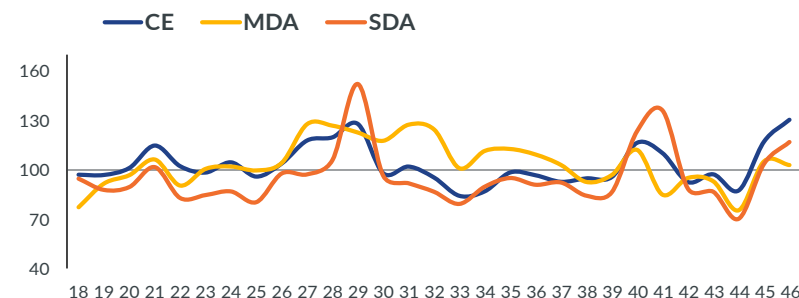
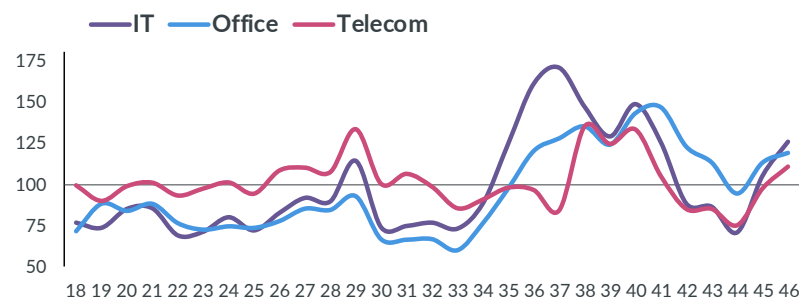
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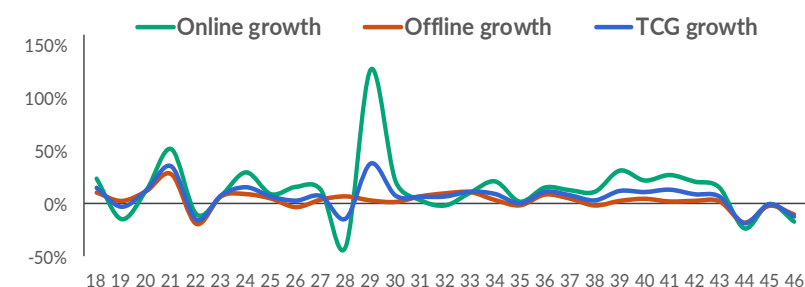
Brazil

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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 46 (Nov 11– Nov 17)

- Online sales at -16% dragged the total TCG market down by 12%. Traditional retail at -9% added to it.
- While laser printers were outstanding at +34%, we saw media tablets and desk computing deliver -23% and -18%. Smartphones slumped at -21%.
- MDAs were at the better end of the scale with flat cooling and washing machines posting +12%. SDAs declined. Shavers led with the biggest decline, at -27%. The winning category in CE was soundbars at +15%, while PTVs decelerated at -8%.



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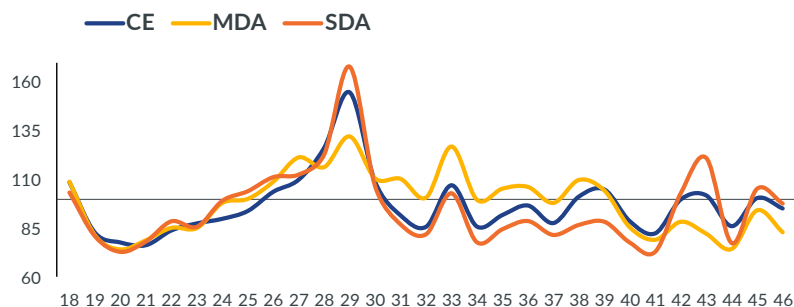
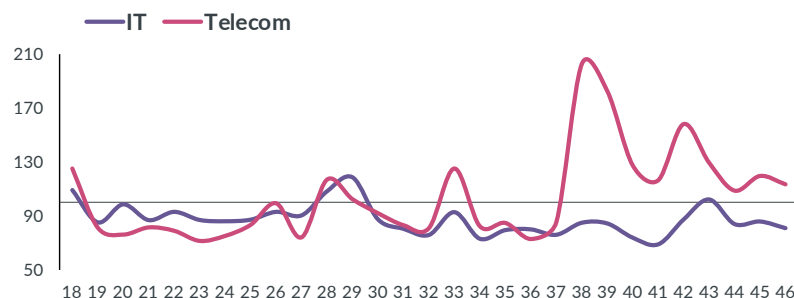
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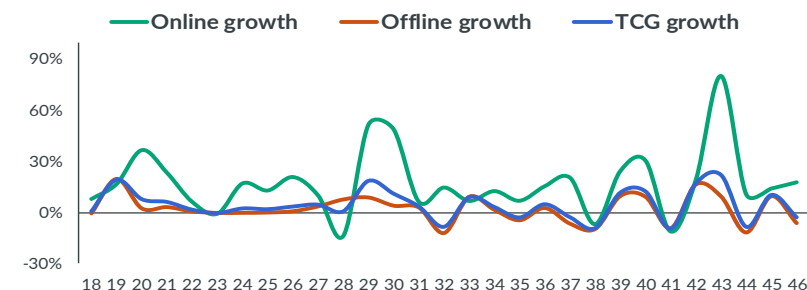
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 46 (Nov 11– Nov 17)

- Traditional retail at -6% dragged the total TCG market down by 3%. Online sales at a good +18% failed to compensate.
- While media tablets performed well at +19%, mobile computing declined by 2%. Smartphones were up 10%.
- Air treatment and cooling posted declines of -25% and -16%. Vacuum cleaners lagged at -8%. The other MDAs/SDAs posted growth with hot beverage makers in the lead at +28% and food preparation second at +17%. While headsets won 15%, PTV slumped at -14%.



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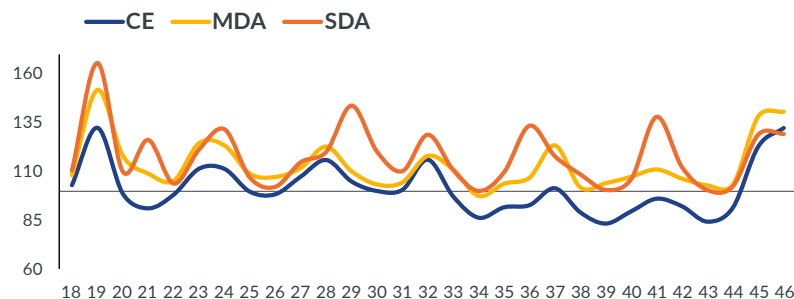
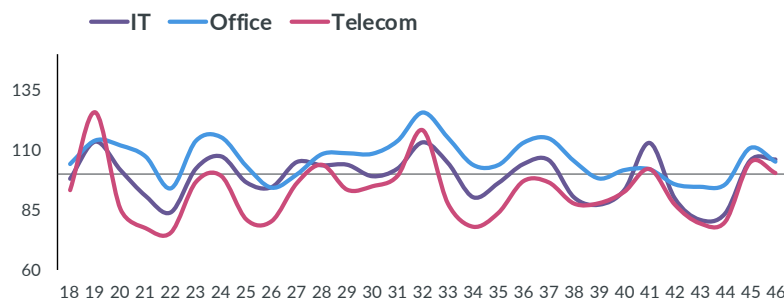
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 46 (Nov 11– Nov 17)

- A plus of 15% for online sales added 7% to the total TCG market. Traditional retail at -1% did not cloud that result.
- IT/office product groups experienced very good results with +35% for desk computing and +24% for printers. Media tablets lagged at -5%. Smartphones were up 2%.
- CE and MDAs/SDAs reported growth throughout. The leading category was hot beverage makers at +32%. Washing machines claimed second place at +31%. Audio home systems were third, at +25%. PTVs were weak at +7%.



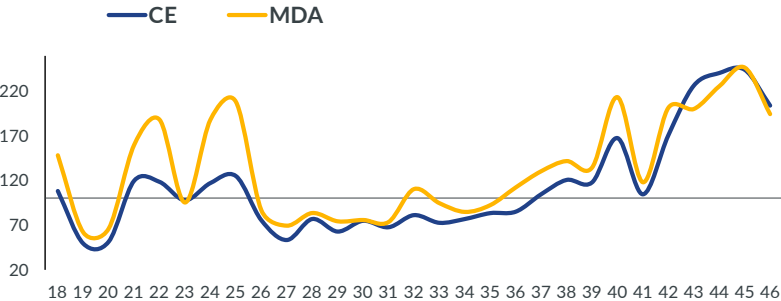
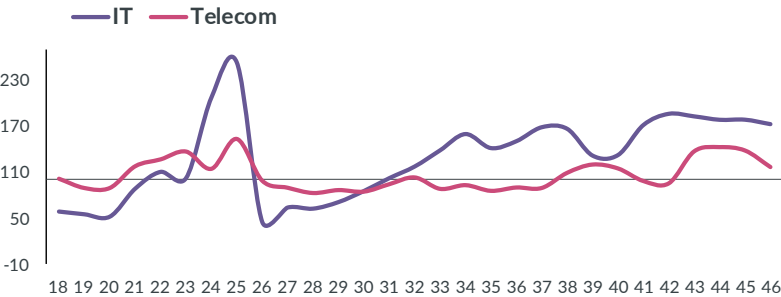
SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 45 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

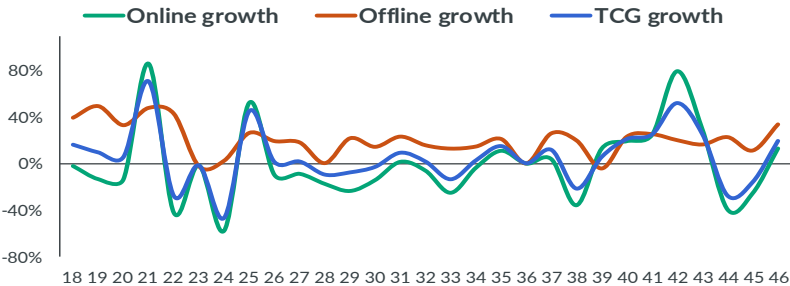
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 46 (Nov 11– Nov 17)

- In 11.11 Singles Day-week, traditional retail grew by 34%, lifting the total TCG market to a plus of 20%. Online sales added to it, at +13%.
- Despite their high share in the product group basket, smartphones at -10% did not impact the market as expected. Mobile computing delivered an increase of 22%.
- There were extreme growth rates for cooling (+341%), washing machines (+212%), and PTV (+227). This was boosted by the trade-in program supported by the central government for replacing existing items with energy-efficient models.



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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