

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 232
Week 47 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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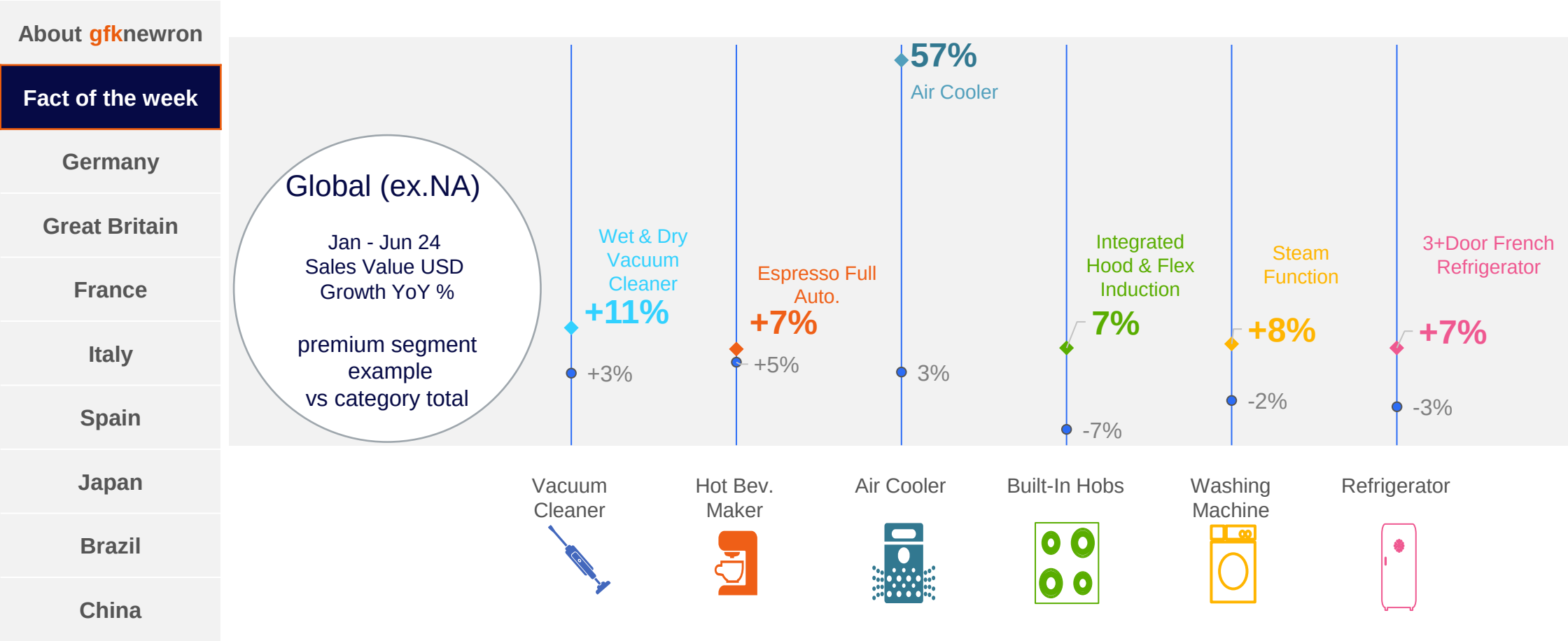
In an era where market fluctuations are the norm, having a finger on the pulse of weekly changes is crucial. **gfknewron** offers more than just data; it provides clarity and direction in a sea of information so you can act based on the most current facts.

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

Select premium feature sales increased/declined slower than the category average due to continued consumer demand



Weekly retail insights from the Point of Sale

Spotlight on Germany

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Fact of the week

Germany

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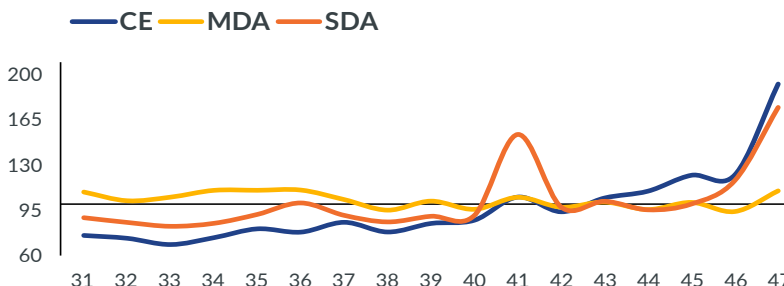
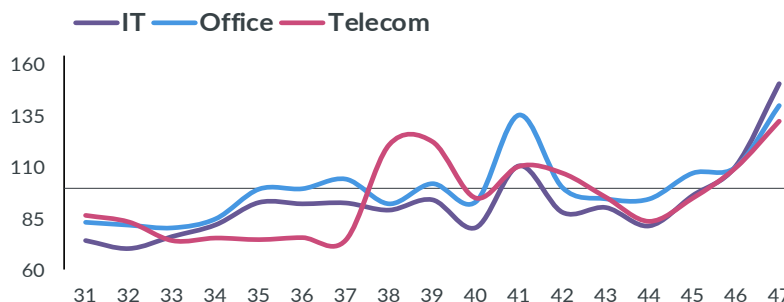
Spain

Japan

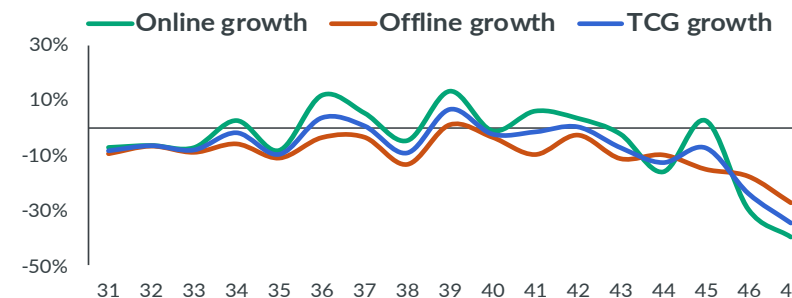
Brazil

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 47 (Nov 18– Nov 24)

- The shift of Black Friday by one week led to strong drops in the week-on-week comparison for online sales (-40%) and traditional retail (-27%). This dragged the total TCG market down by 35%.
- The only category not hit by a double-digit decline was laser printers at -2%. Next was desk computing at -19%. All other IT/office product groups lost 25% or more with mobile computing in the lead at -45%. Smartphones slumped at -31%.
- In CE/MDA/SDA categories washing machines were hit least at -19%. PTV ended the week at -33%.

SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 47 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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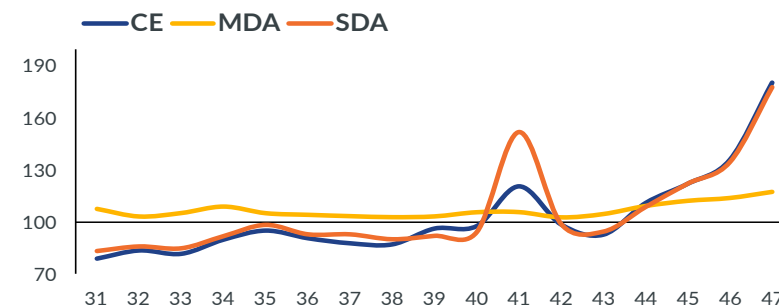
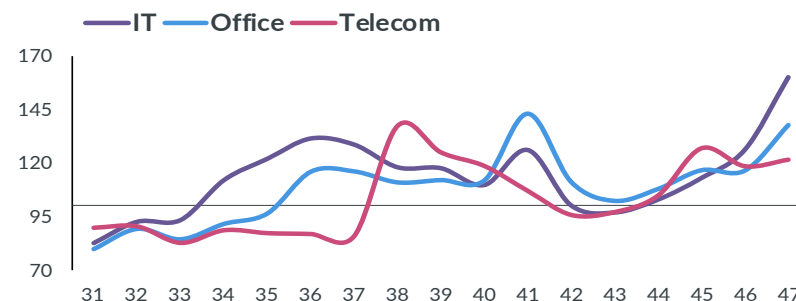
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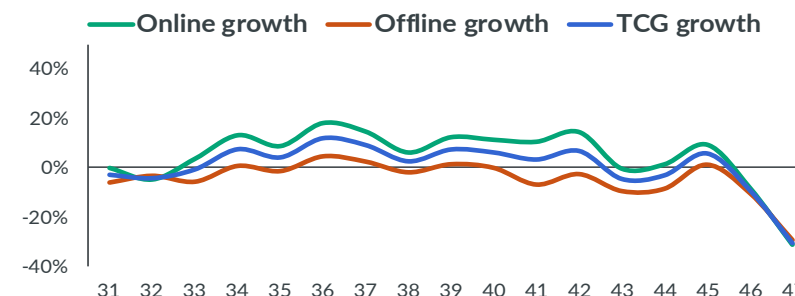
Brazil

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 47 (Nov 18– Nov 24)

- Close rates of -31% for online sales and -29% for traditional retail pulled the total TCG market down by 31%.
- Except for printers, losing less than 20%, all other IT/office products declined more with media tablets in the lead at -51%. Smartphones slumped at -25%.
- While MDAs declined by less than 20%, CE categories lost more than 30%. In SDA, food preparation decreased by 11% and shavers dropped by 36%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 47 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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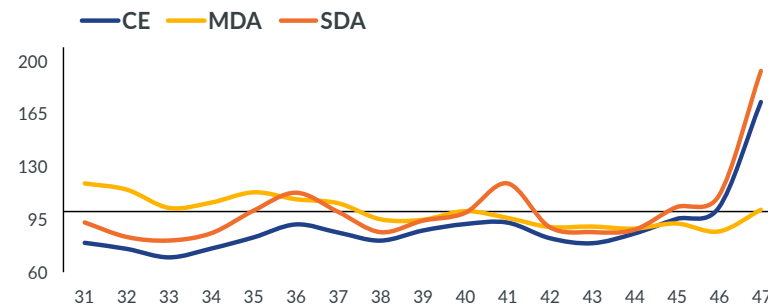
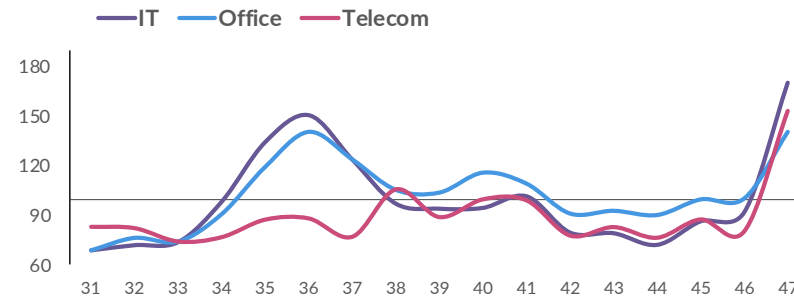
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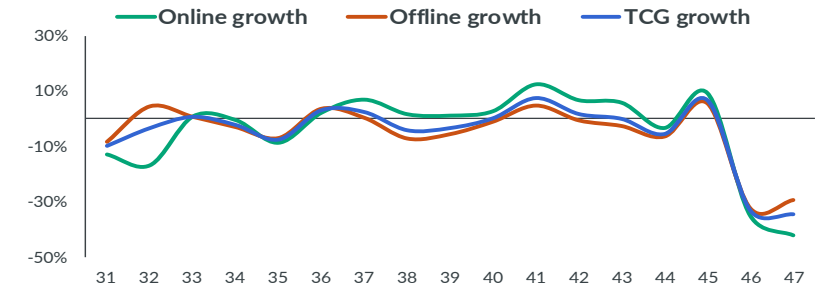
Brazil

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 47 (Nov 18– Nov 24)

- Both online sales at -42% and traditional retail at -29% dragged the total TCG market down by -35%.
- In contrast to all other categories, laser printers delivered an exceptional growth of 58%. The rest of IT/office product groups declined by more than 25%. Smartphones posted -41%.
- Within MDAs/SDAs, only dental care posted a single-digit decline. Audio home systems were the worst-performing category, delivering -50%. PTVs decelerated by 38%.



SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 47 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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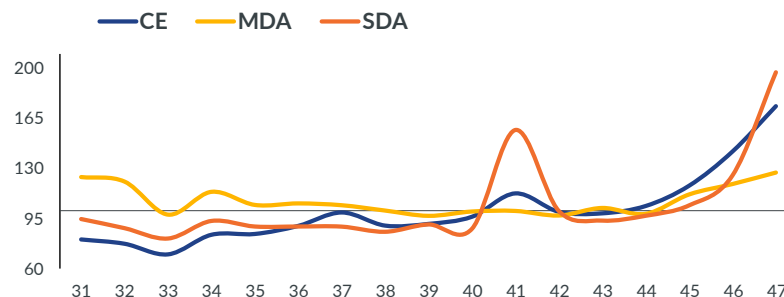
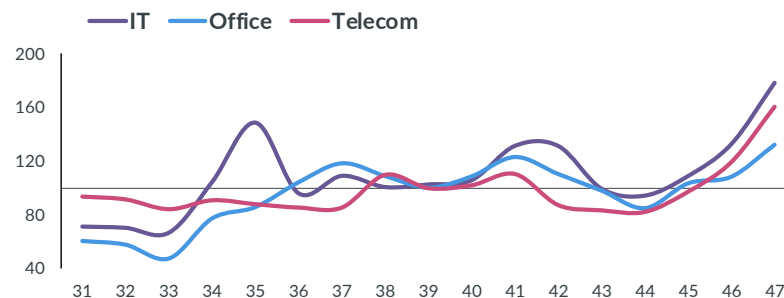
Spain

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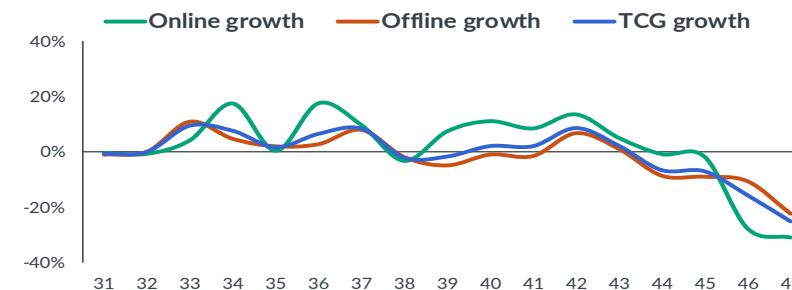
Brazil

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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 47 (Nov 18– Nov 24)

- Online sales at -31% dragged the total TCG market down by 25%. Traditional retail at -22% added to it.
- While desk computing lost 8%, all other IT/office products fell in double-digits with inkjet printers out in front at -36%. Smartphones slumped at -25%.
- Among the negative trends for MDAs/SDAs, air treatment was the category hit the least at -10%. The worst-performing product group was shavers (-41%). Hot beverage makers and food preparation were both at -28%. In CE, soundbars led at -33%. PTVs were down 29%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 47 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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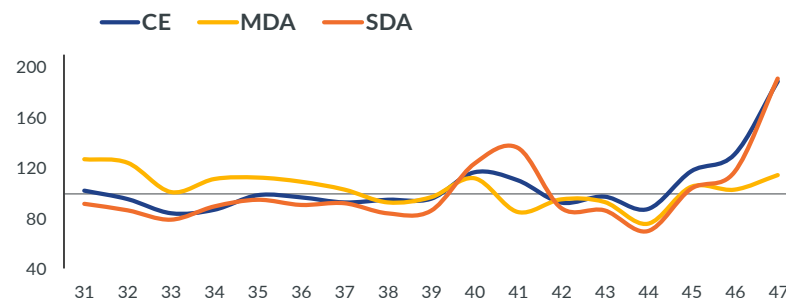
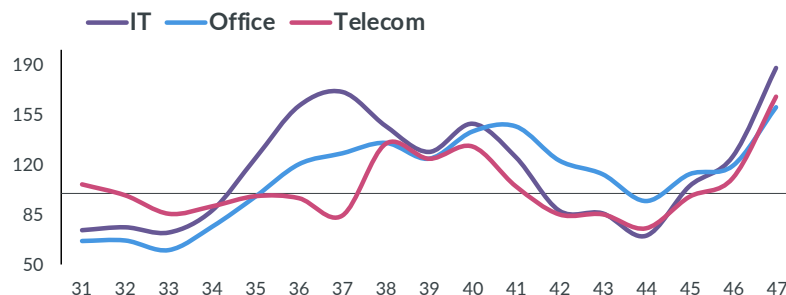
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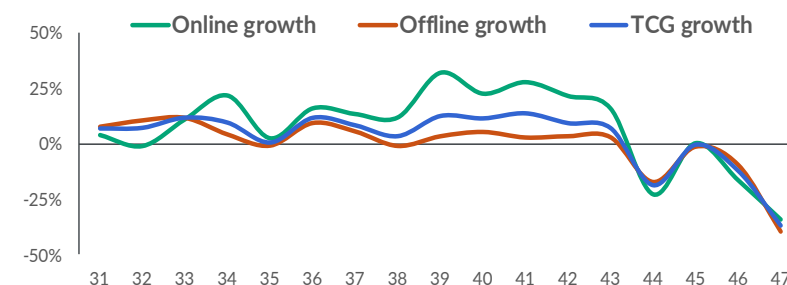
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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 47 (Nov 18– Nov 24)

- With trends of -34% for online sales and -39% for traditional retail, week 47 ended at -37% for the total TCG market.
- While laser printers were hit at -4%, we saw media tablets and mobile computing delivering -38% and -40%. Smartphones slumped at -33%.
- MDAs/SDAs declined ranging from -25% for washing machines to -51% for shavers. In CE, soundbars declined by 32% and PTV lost 40%.



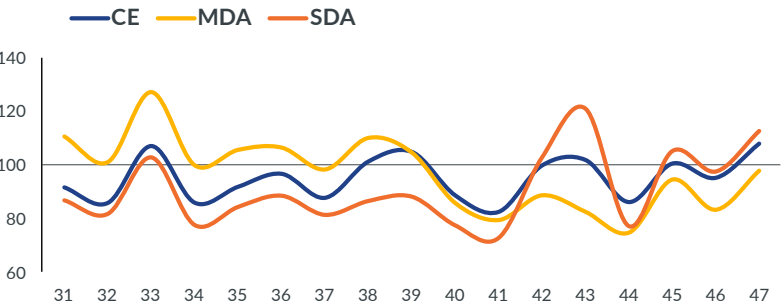
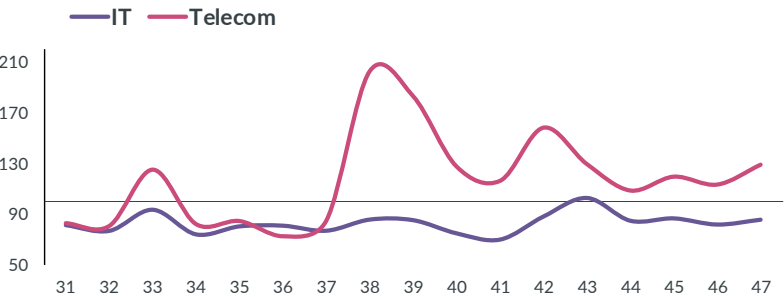
SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 47 2024 (no comparability with 2019); Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (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

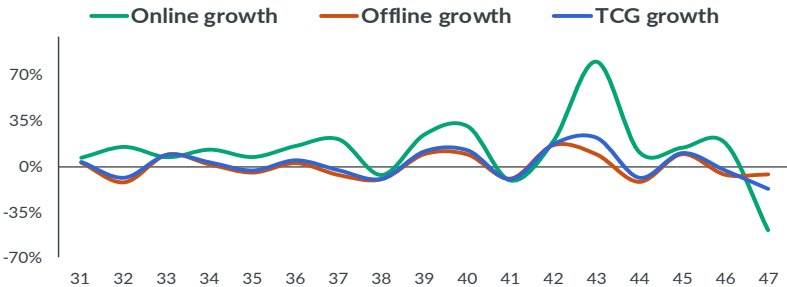
Spotlight on Japan

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



Key take aways in calendar week 47 (Nov 18– Nov 24)

- Both traditional retail at -6% and online sales at -49% dragged the total TCG market down by 17%.
- While media tablets suffered at -40%, mobile computing declined by 13%. Smartphones were down 10%.
- MDAs were hit in single digits, washing machines at -4% and cooling at -6%. Food preparation posted -9%. Dental care was the worst-performing category at -47%. While headsets decelerated at -44%, PTV slumped at -19%.



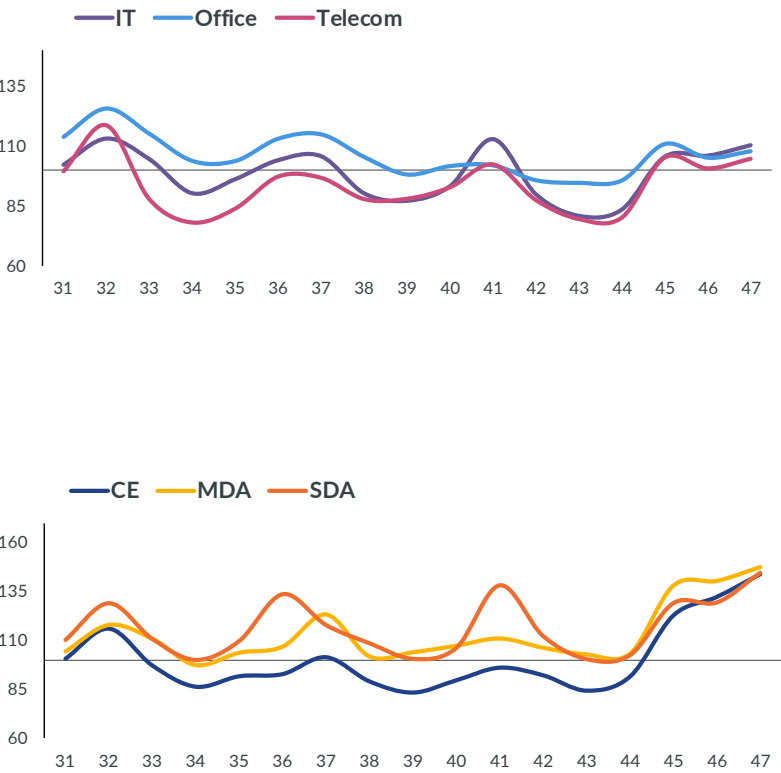
SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 47 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile computing, media tablets – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and 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

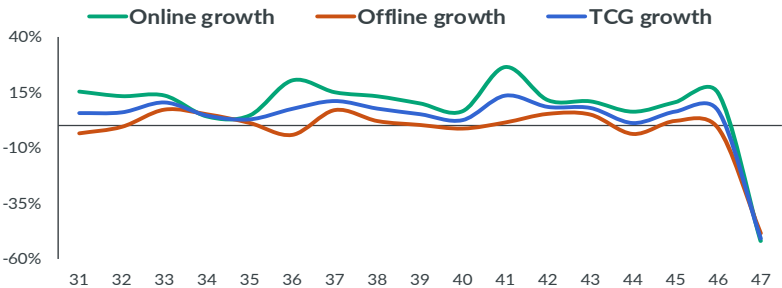
Spotlight on Brazil

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



Key take aways in calendar week 47 (Nov 18– Nov 24)

- The deceleration of both online sales at -52% and traditional retail at -49% delivered a minus of 51% to the total TCG market.
- Within IT/office, laser printers at -14% were hit the least. Mobile computing posted -55%. Smartphones were down 53%.
- CE and MDAs/SDAs reported strong declines. The leading category was PTV at -56%, followed by cooling at -46% and hot beverage makers at -41%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 47 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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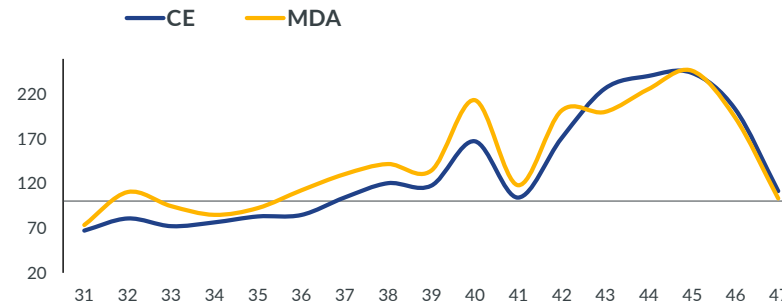
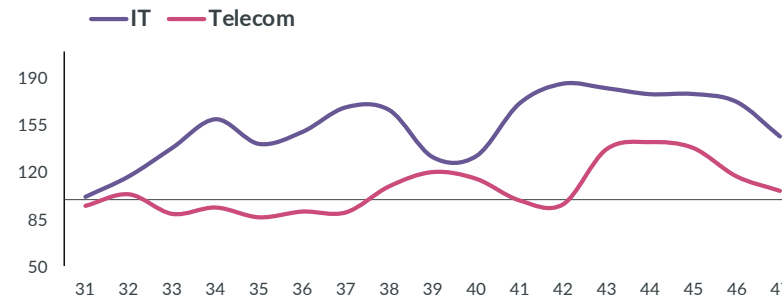
Spain

Japan

Brazil

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



Key take aways in calendar week 47 (Nov 18– Nov 24)

- Even a week after Singles Day, traditional retail grew by 14%, lifting the total TCG market to a plus of 18%. Online sales added to it at +22%.
- Due to their high share in the product group basket, smartphones at just +5% impacted the total result. Mobile computing delivered an increase of 71%.
- There were good results for cooling (+43%), washing machines (+33%), and PTV (+53%). This was boosted by the trade-in program supported by central government for replacing existing items with energy-efficient models.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 47 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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