



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 110

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gfknewron



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> About gfknewron

Fact of the week

Germany

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Italy

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Volatility and uncertainty is forecasted to remain throughout 2022 and beyond. It's never been more important to act based on facts, with data-driven decisions being made across the whole organization.

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Fact of the week: FMCG vs TCG markets – the sustainability gap



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> Fact of the week

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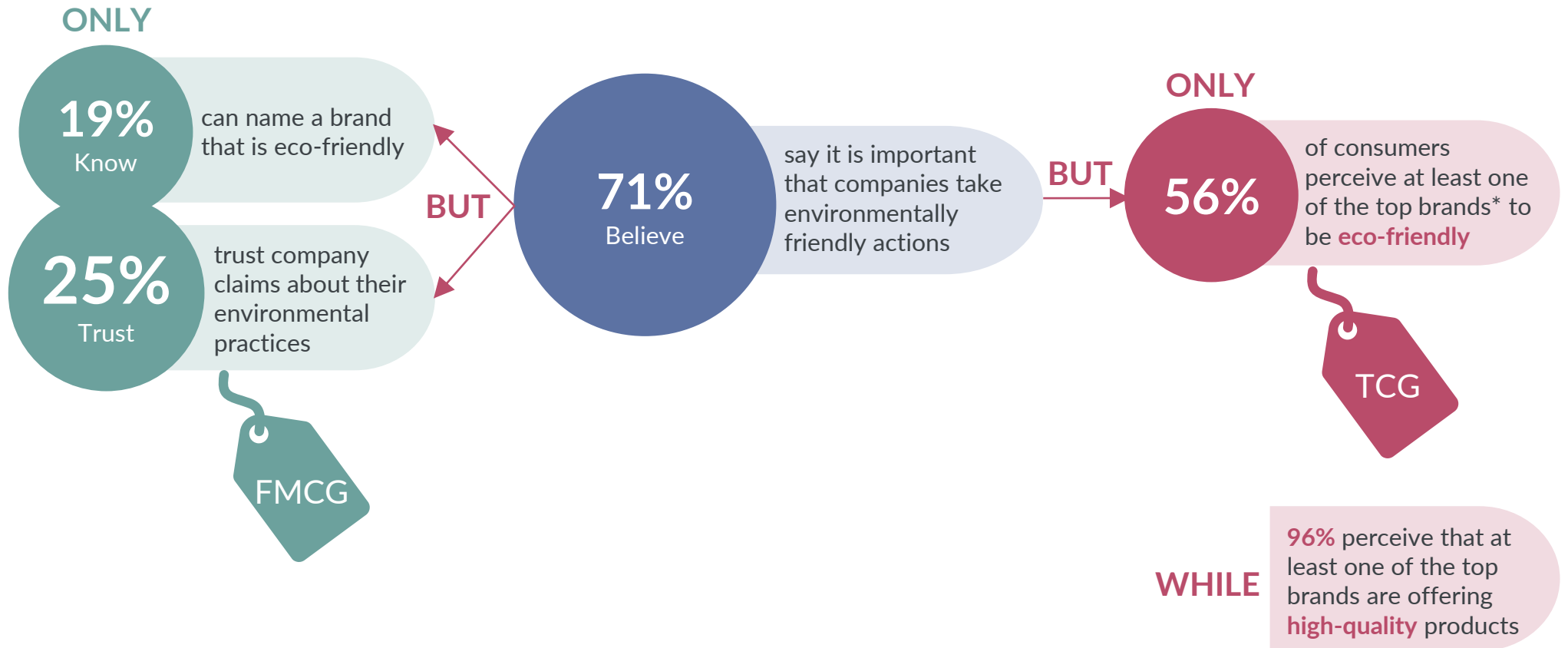
Spain

Russia

Japan

Brazil

China



Source: Who Cares, Who Does Study 2020 EU-10 / gfknewron Consumer Q4 2021 international coverage, all countries; *top 10 brands per country per product group

Weekly retail insights from the Point of Sale: Spotlight on Germany



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Fact of the week

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France

Italy

Spain

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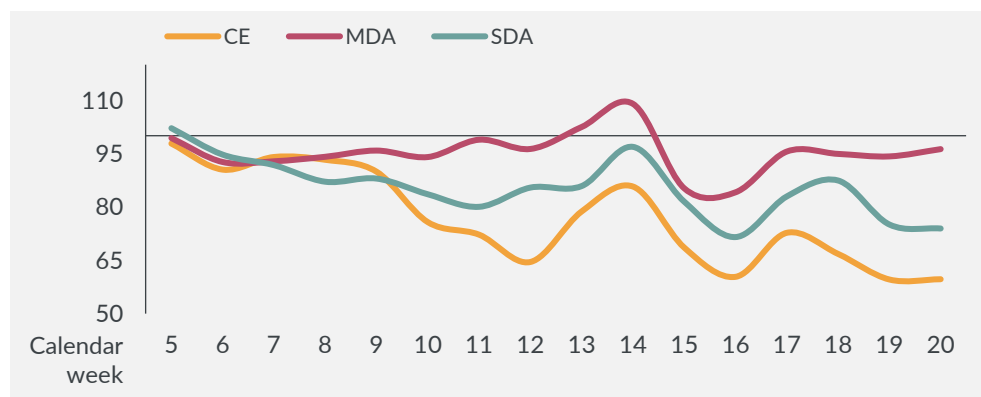
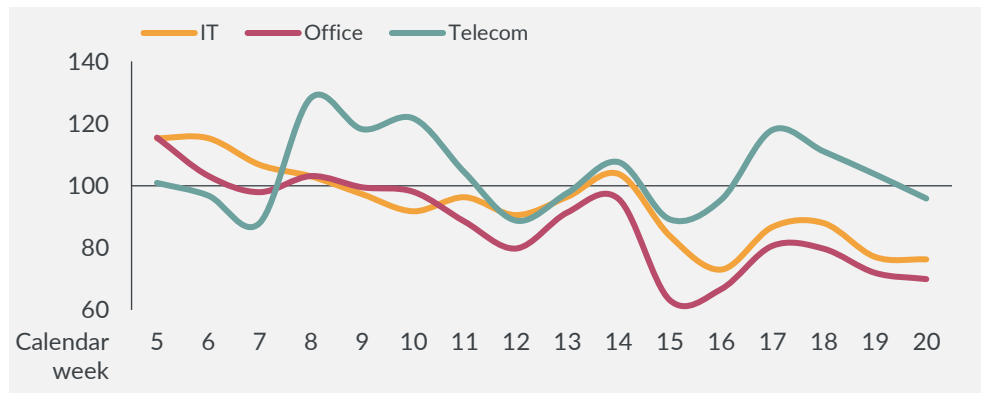
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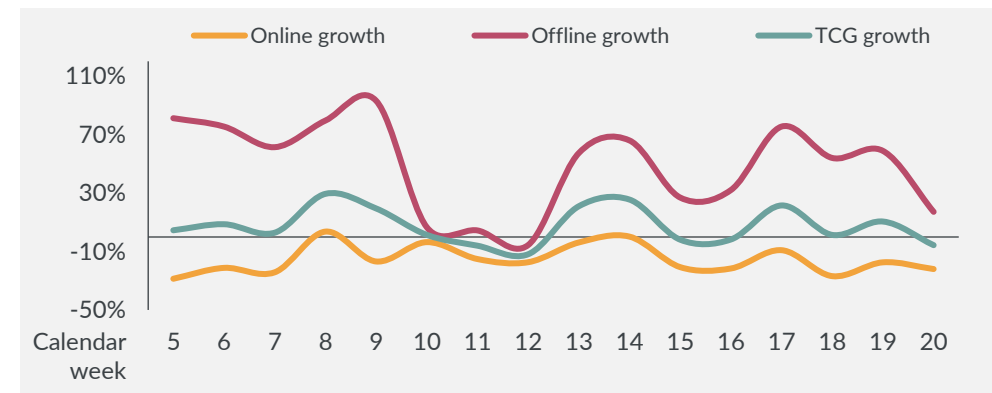
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

Index: 2021 average weekly turnover in EUR = 100



Please note: Below lines depict the sales growth rate vs. same week of previous year.

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



Key take aways in calendar week 20 (May 16 – May 22)

- Traditional retail experienced a plus of 17% vs week 20 in 2021, but this failed to compensate for the losses of online sales (-22%) and left the total TCG at a minus of 6%.
- All IT/Office product groups decelerated in double digits apart from monitors at -7%. Smartphones were up by 7%.
- There were double-digit losses for CE products, food preparation, and vacuum cleaners. Shavers were the best performing product group in week 20 at +18%. MDAs posted smaller positive trends.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 20 2022; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, 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): 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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Fact of the week

Germany

> Great Britain

France

Italy

Spain

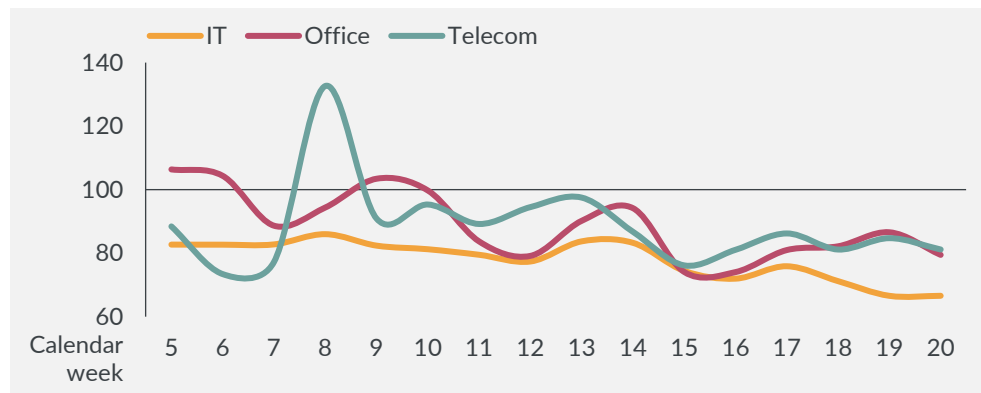
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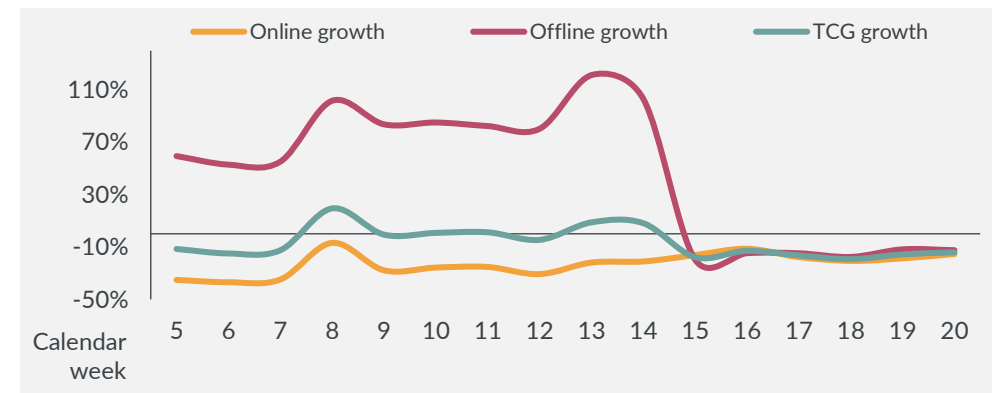
Brazil

China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- Online sales delivered -15% (-19% the previous week) and traditional retail was down -12% (the same as the previous week), resulting in a downswing of the total TCG market of -14%.
- All IT/Office products were double-digit negative, led by media tablets at -42%. Smartphones lagged at -9%.
- Some MDA/SDA/CE products experienced a recovery. Shavers and dental care even turned positive (+1%). Audio home systems delivered a big drop from -30% in week 19 to -42% in week 20.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 20 2022; 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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> France

Italy

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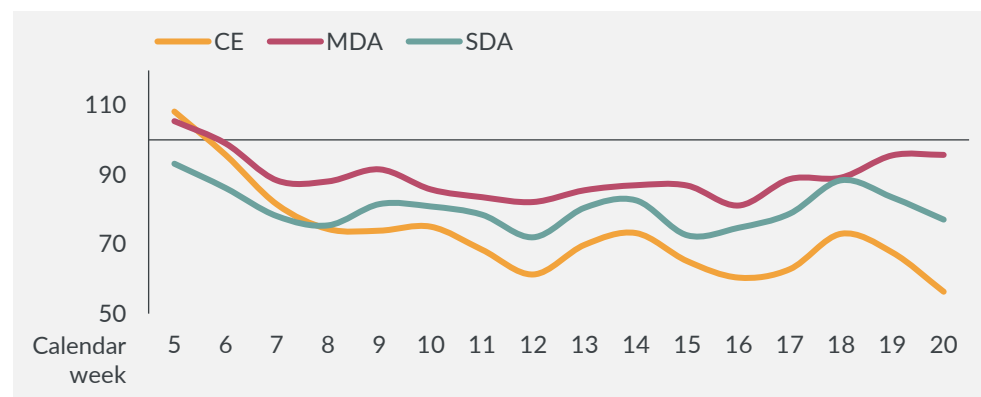
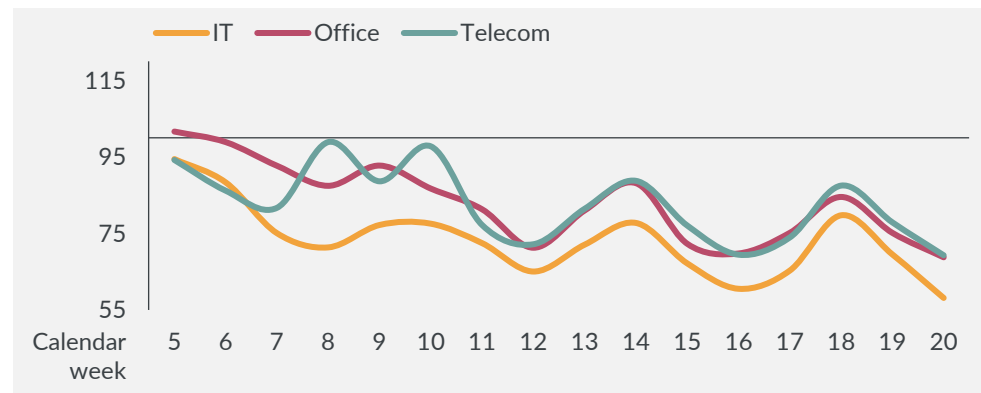
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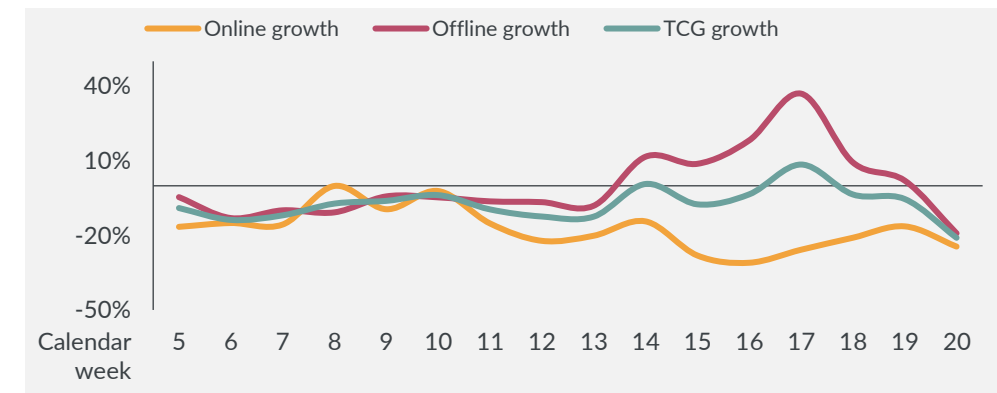
Brazil

China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- Online sales delivered -24% (-16% the previous week) and traditional retail was down -19% (+2% the previous week), resulting in a downswing of the total TCG market of -21%.
- IT/Office products were double-digit negative, led by media tablets and desk computing at -33%. Smartphones slumped at -22%.
- Air treatment saw outstanding growth of +316%. Except for cooling at +6%, all other MDA/SDA/CE products posted negative trends. The weakest product group was soundbars at -41%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 20 2022; 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, 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 Italy



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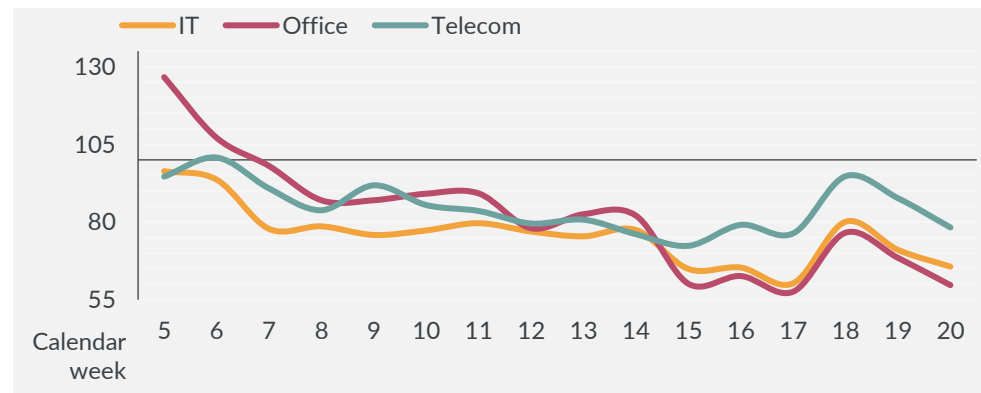
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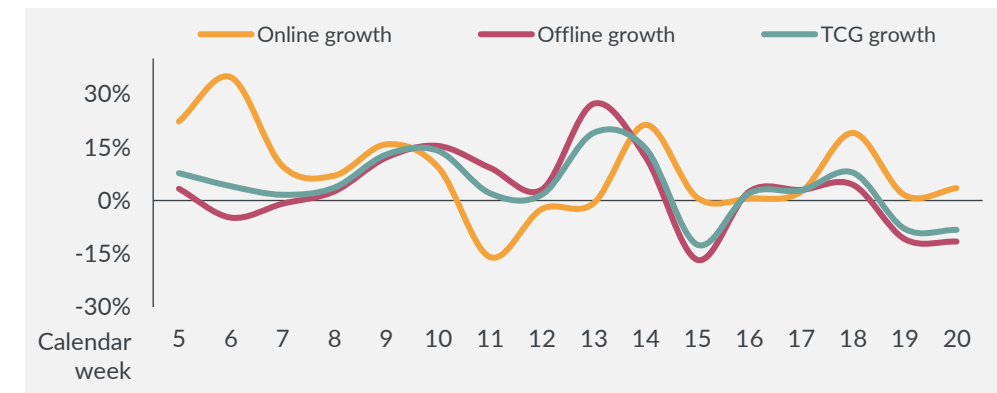
Brazil

China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- The total TCG market fell by 8%, driven by traditional retail posting -11%. Online sales were up 4% (from +1% in week 19).
- IT/Office products ranged from -51% for laser printers to +3% for media tablets. Smartphones decelerated at -6%.
- Air treatment delivered exceptional growth of 96%. Cooling (+16%), shavers (+12%), and dental care (+8%) posted positive results as well. Food preparation and audio home systems came in last place at -22%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 20 2022; 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, 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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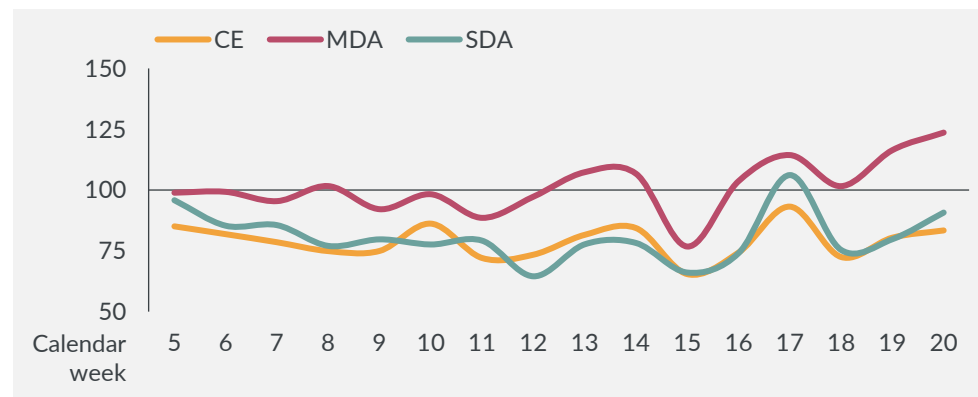
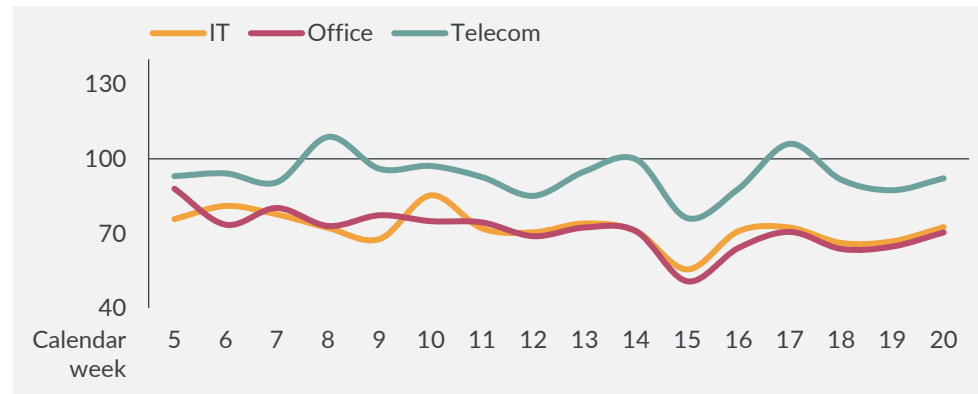
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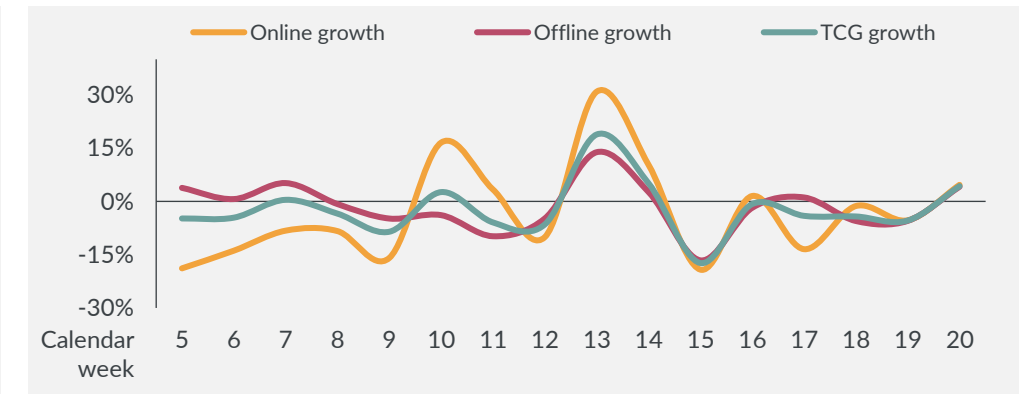
Brazil

China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- Online sales (+5%) and traditional retail (+4%) delivered similar results, which led to an upswing of 4% for the total TCG market.
- Laser printers were the best performing product group among IT/Office products. Desk computing and media tablets slumped at -31% and -21% respectively. Smartphones were up 6%.
- MDA/SDA/CE products posted positive trends throughout, ranging from +0.4% for TVs to +38% for soundbars.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 20 2022 (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 Russia



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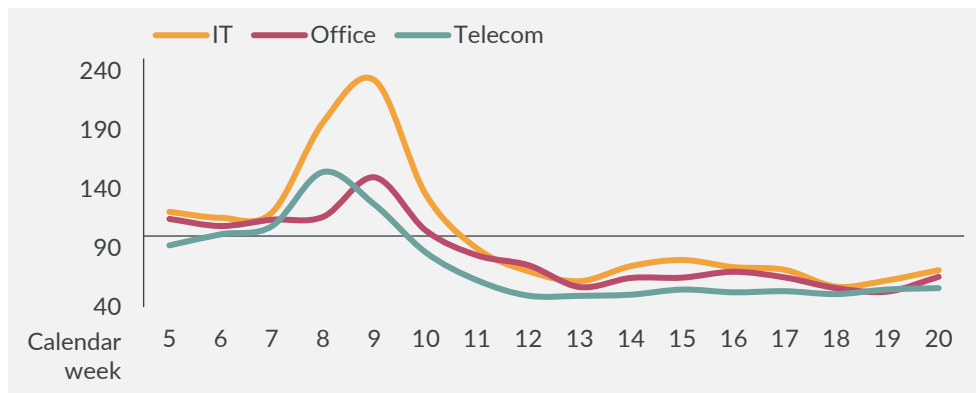
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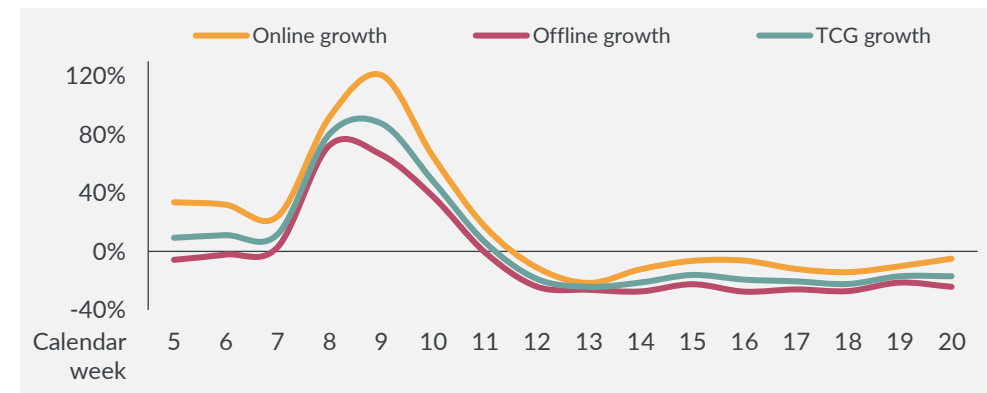
Brazil

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Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- The total TCG market continued its negative trend (-17%), driven by traditional retail at -24%. Online sales performed better but were still down by 5%.
- The most impacted product groups were media tablets (-31%) and smartphones (-28%). Keyboards were up 24% and monitors 14%.
- Audio home systems posted an outstanding growth of +60% while MDAs were down 17%. SDA products delivered positive trends apart from air treatment at -13% and vacuum cleaners at -5%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 20 2022; 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, 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 Japan



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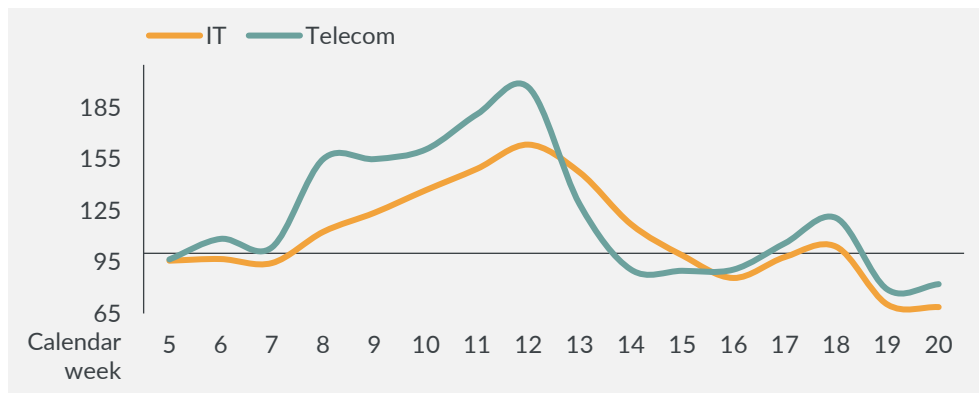
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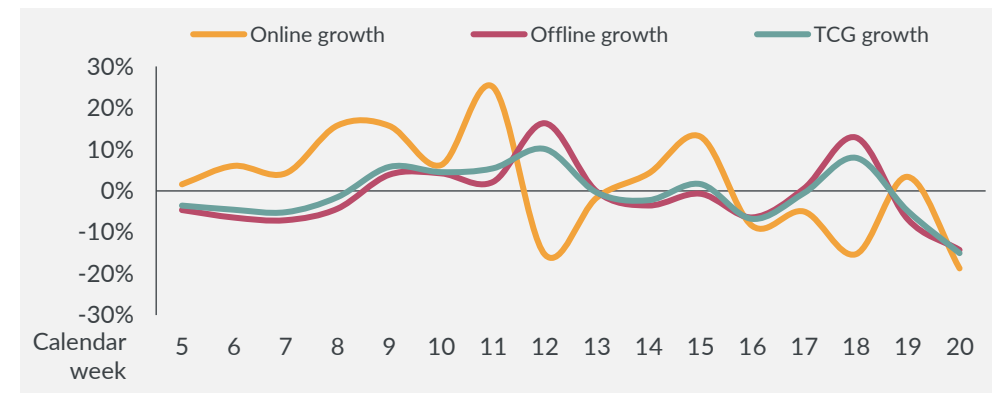
Brazil

China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- Deceleration of traditional retail (-14%) dragged the total TCG market down by -15%. Online sales added to it by delivering -19%.
- Headsets (+12%) and smartphones (+16%) posted growth while mobile computing and media tablets were down at -18% and -32%.
- MDA/SDA/CE products witnessed negative trends ranging from -70% for air treatment to -4% for soundbars. Cooling, vacuum cleaners, and hot beverage makers were the only other product groups with single-digit losses (-9%).

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 20 2022; 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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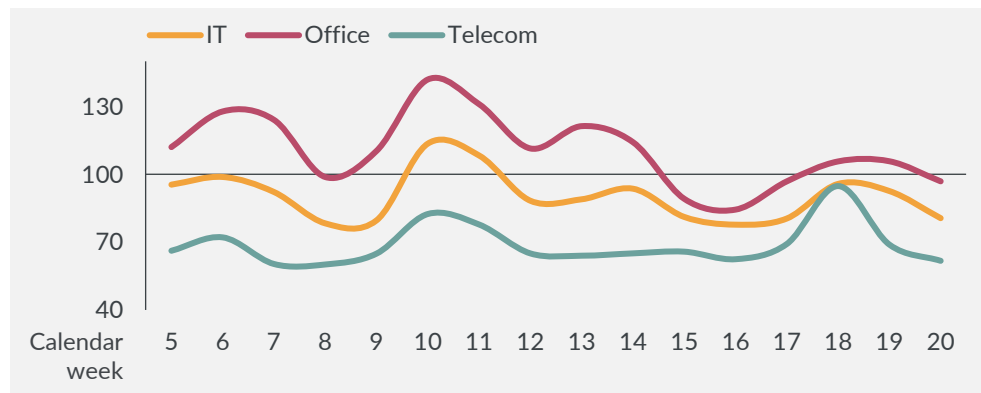
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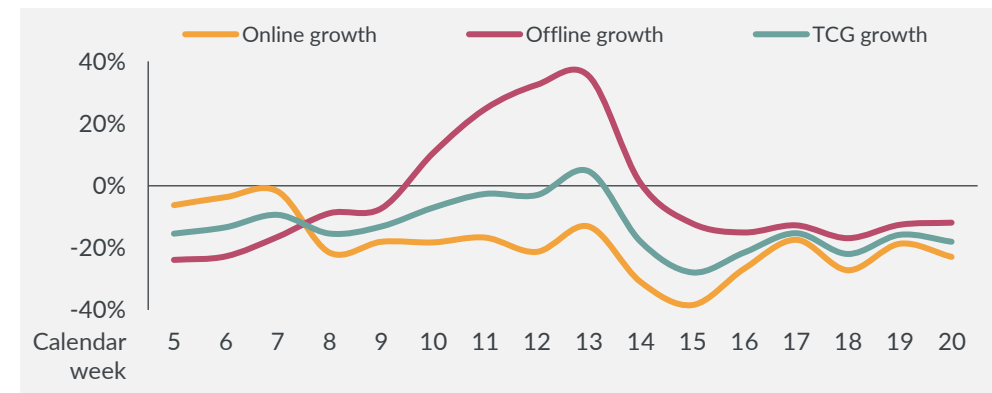
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China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- Solid decreases for both traditional retail (-12%) and online sales (-23%) delivered a negative trend (-18%) for total TCG.
- The rates for IT/Office and telecom products ranged from -35% for smartphones to -2% for desk computing. Laser printers were the ray of light at +29%.
- The mixed picture for MDA/SDA/CE product groups delivered double-digit positive trends for hot beverage makers and TVs, while shavers slumped at -13%. Vacuum cleaners were down -9%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 20 2022; 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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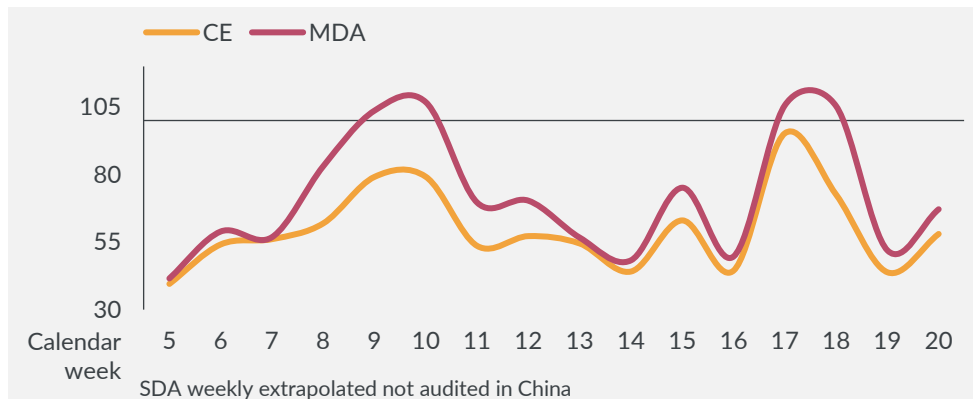
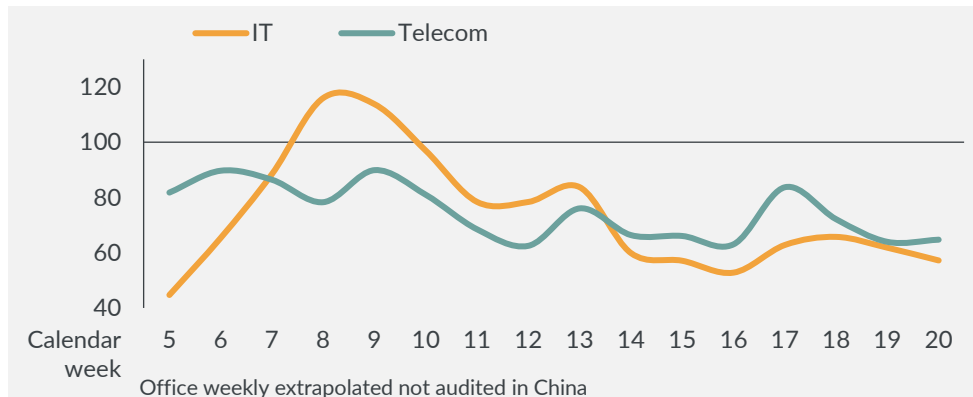
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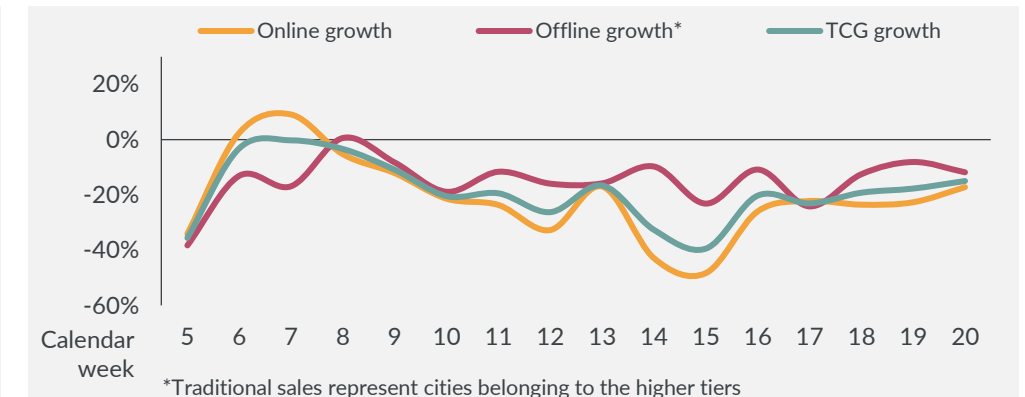
Brazil

> China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 16 – May 22)

- Both distribution channels continued to fall week-on-week. Traditional retail posted -12%, down from -8% last week. Online sales shifted from -23% to -17%. Combined this delivered a minus of 15% for total TCG in week 20.
- Mobile PCs posted a decrease of 2% compared to week 20 in 2021. Smartphones delivered a strong minus of 19%.
- Week 20 saw a double-digit drop for washing machines (-15%). Cooling and TV sales both lost 7%.



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Authors:
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