



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 111

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gfknewron



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> About gfknewron

Fact of the week

Germany

Great Britain

France

Italy

Spain

Russia

Japan

Brazil

China

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: Smart Home adoption accelerated



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EU7 | Sales Value USD & Growth % | Jan-Mar 2022 vs 2021 | Smart tech & durable goods



Home
Automation



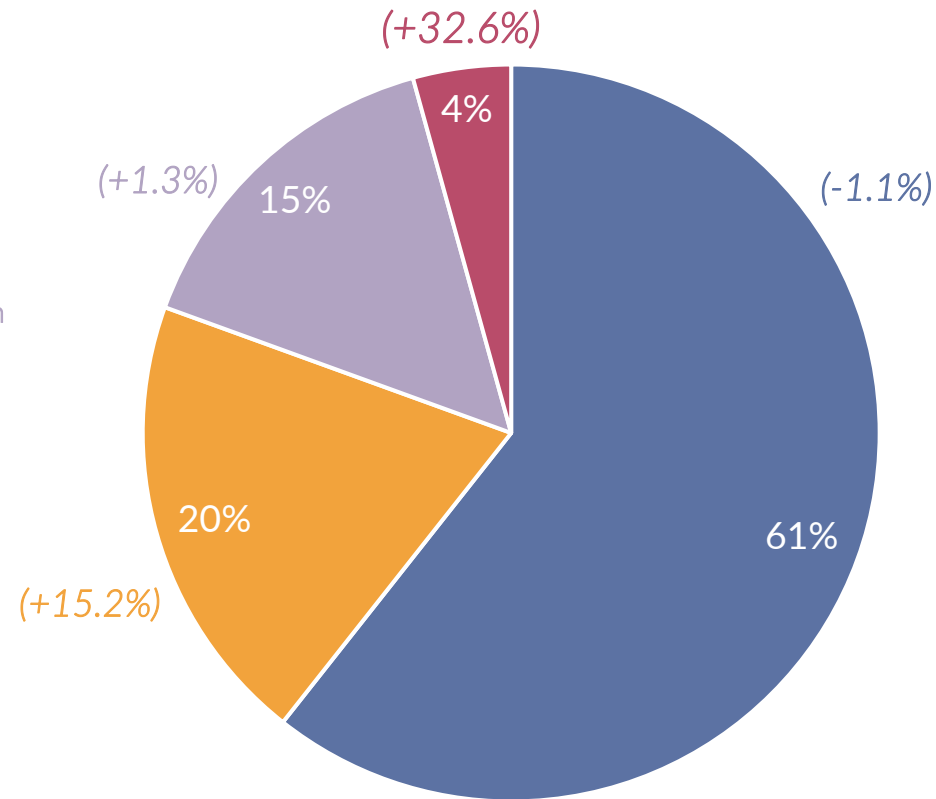
Small Domestic
Appliances & Health



Major Domestic
Appliances



Entertainment &
Office



Smart tech &
durable goods

\$7.4bn
(+3%)
(w/o TV +5%)

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



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Fact of the week

> Germany

Great Britain

France

Italy

Spain

Russia

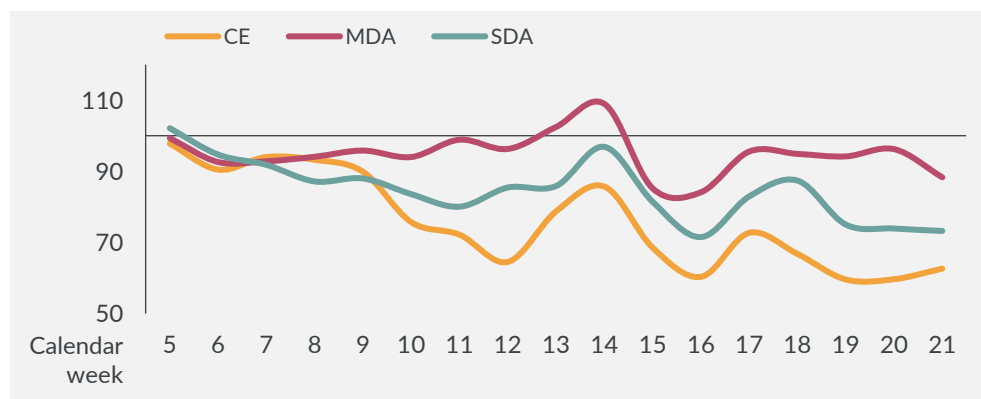
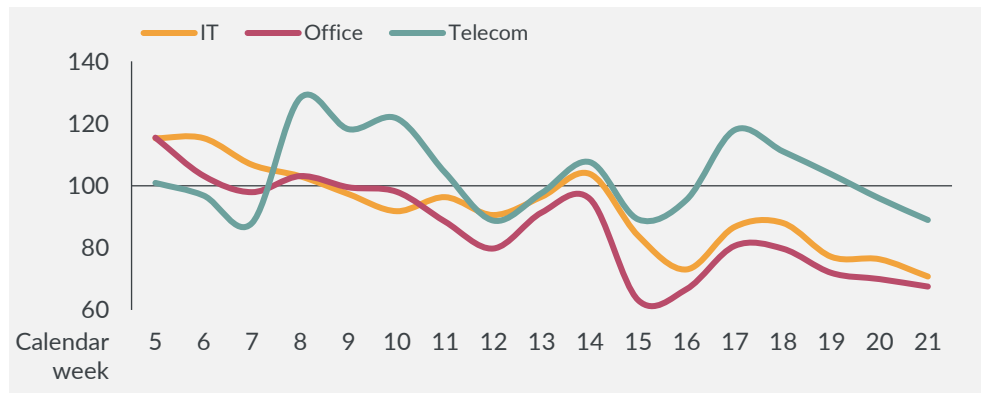
Japan

Brazil

China

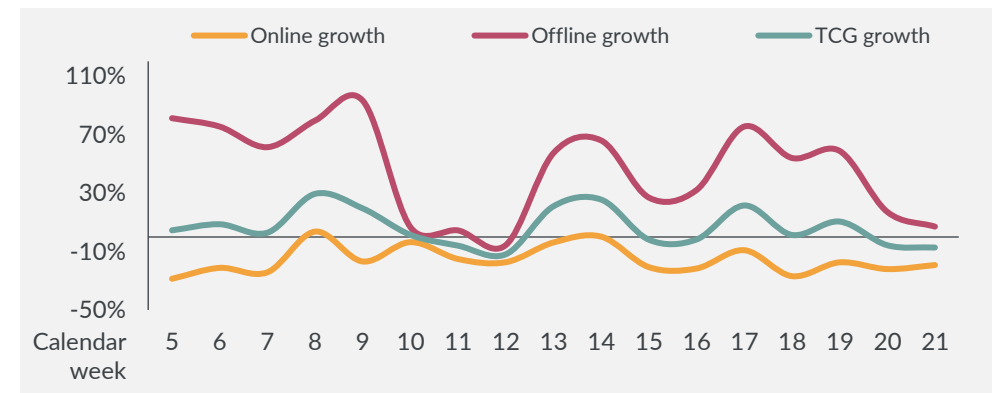
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 21 (May 23 – May 29)

- Traditional retail experienced a plus of 7% vs week 21 in 2021, but this failed to compensate for the losses in online sales (-19%) and left the total TCG at a minus of 7%.
- All IT/Office product groups decelerated in double digits, ranging from -39% for laser printers to -10% for monitors. Smartphones were up by 3%.
- There were double-digit losses for CE products, food preparation, and hot beverage makers. Cooling posted +4% and shavers +7%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 21 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

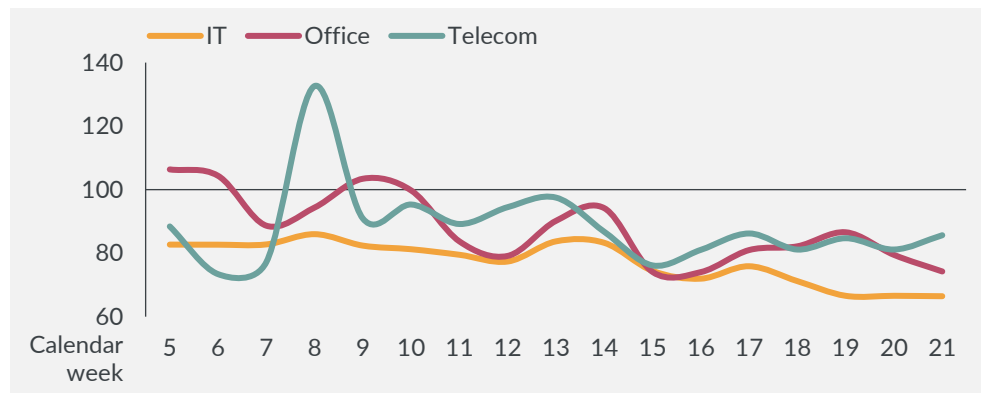
Russia

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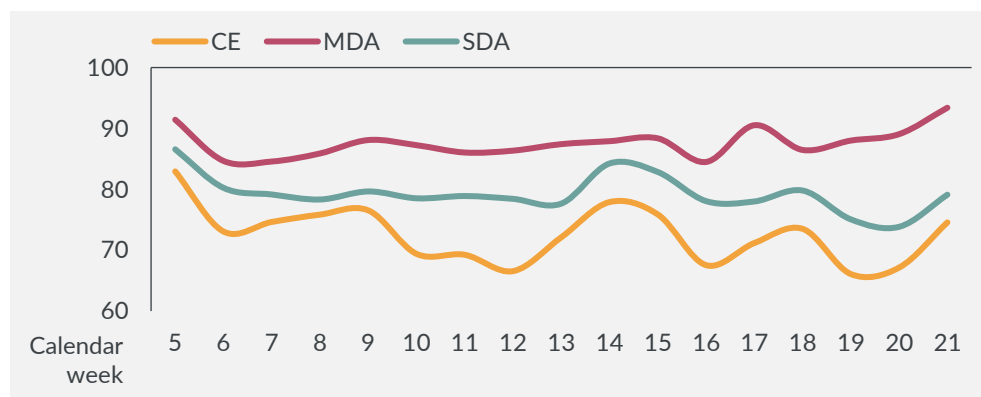
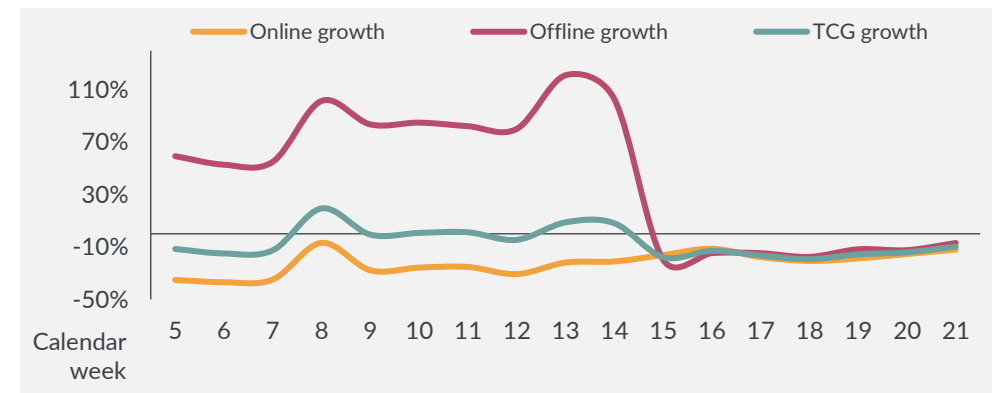
Brazil

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 21 (May 23 – May 29)

- Online sales delivered -12% (-15% the previous week) and traditional retail was down -7% (-12% the previous week), resulting in a downswing of the total TCG market of -10%.
- All IT/Office products were double-digit negative, led by media tablets at -37%. Smartphones lagged at -5%.
- All MDA/SDA/CE products experienced some recovery except dental care which dropped from +1% in week 20 to -0.3% in week 21. Shavers delivered positive growth of 8%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 21 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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Fact of the week

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> France

Italy

Spain

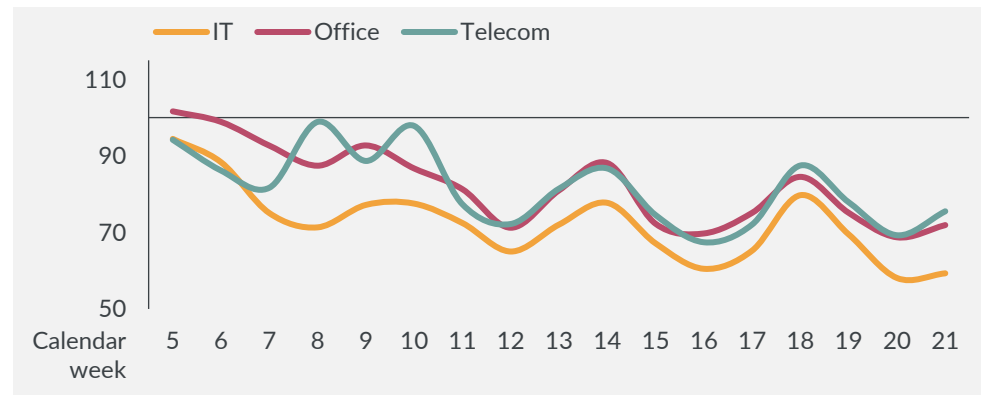
Russia

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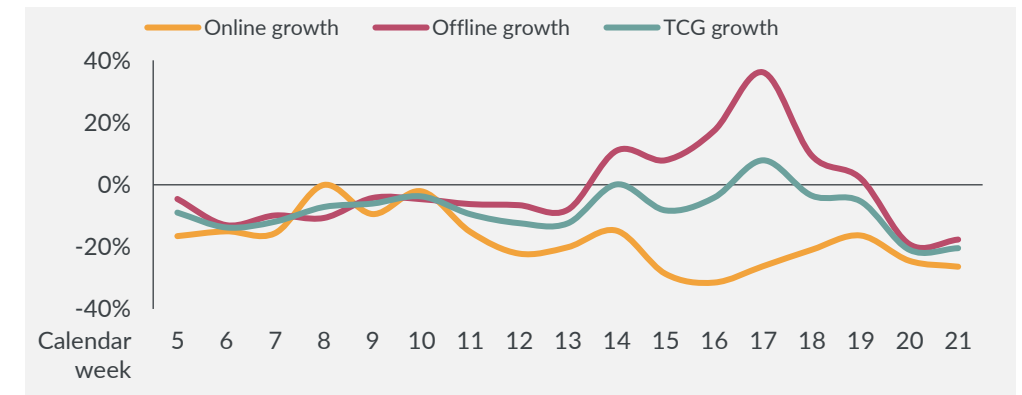
Brazil

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 21 (May 23 – May 29)

- Online sales delivered -26% (-24% the previous week) and traditional retail was down -18% (-19% the previous week), resulting in a downswing of the total TCG market of 20%.
- IT/Office products were double-digit negative, led by media tablets at -32%. Smartphones slumped at -18%.
- Air treatment saw remarkable growth of +56% and dental care accelerated at +24%. Most other MDA/SDA/CE products posted double-digit negative trends with soundbars in the lead at -42%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 21 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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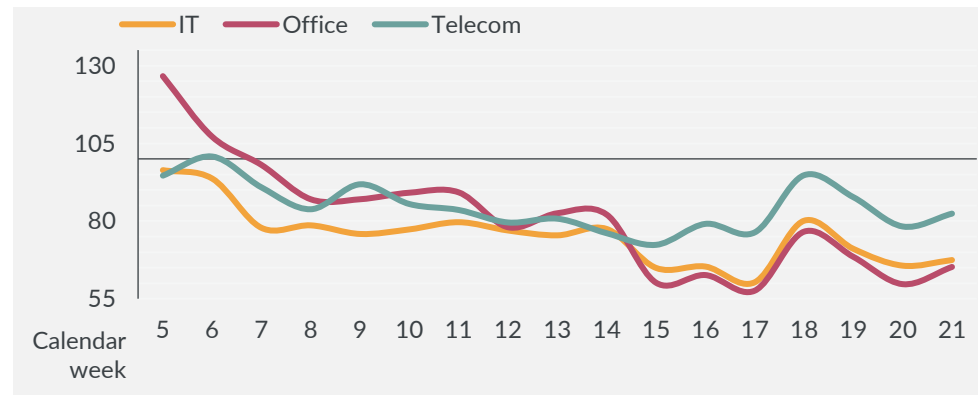
Russia

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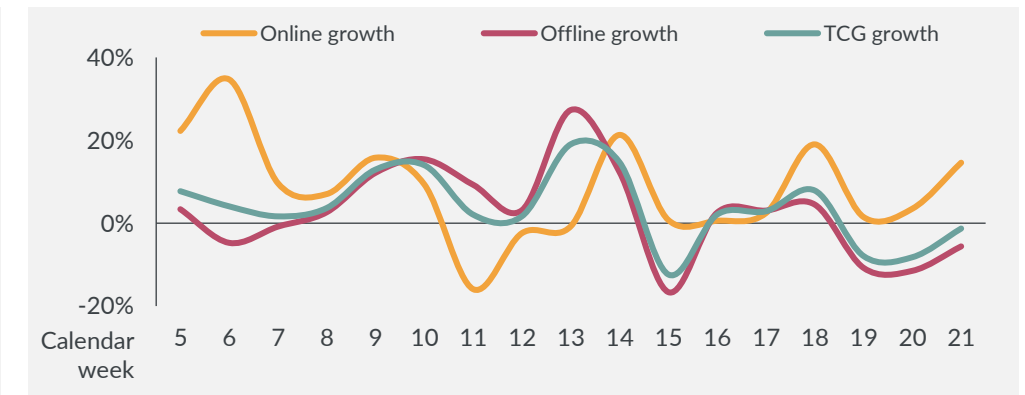
Brazil

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 21 (May 23 – May 29)

- The total TCG market fell by 1%, driven by traditional retail posting -6%. Online sales were up 15% (from +4% in week 20).
- IT/Office products ranged from -35% for desk computing to +1% for media tablets. Smartphones accelerated at +2%.
- Air treatment delivered exceptional growth of 138%. Cooling (+30%) and shavers (+23%) posted positive results as well. Food preparation and audio home systems came in last place at -20% and -24% respectively. TV sales posted -8%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 21 2022; 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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Fact of the week

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France

Italy

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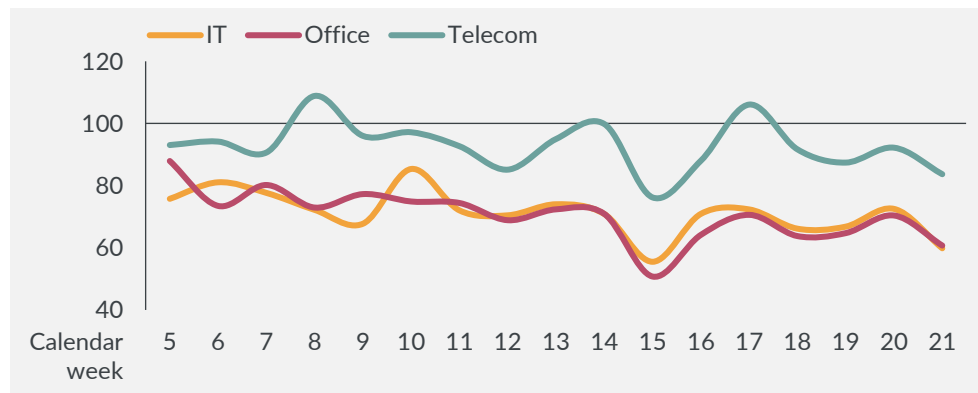
Russia

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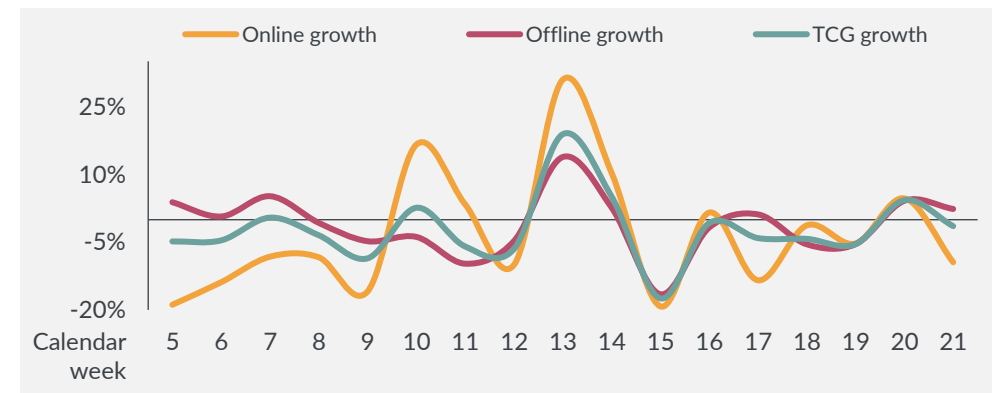
Brazil

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 21 (May 23 – May 29)

- As traditional retail slowed to +2% and online sales dropped by 9%, the total TCG market experienced a slight downswing of 1%.
- Laser printers were the best performing product group among IT/Office products at +7%. Desk computing and media tablets slumped at -33% and -21% respectively. Smartphones were up 1%.
- MDA and SDA products posted positive trends with cooling in the lead at +18%. CE products delivered negative results at -10% for TV sales and -28% for audio home systems.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 21 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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Spain

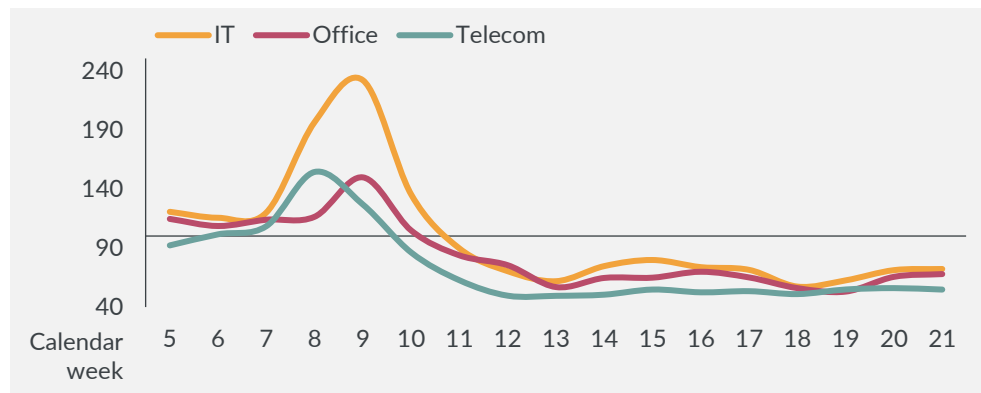
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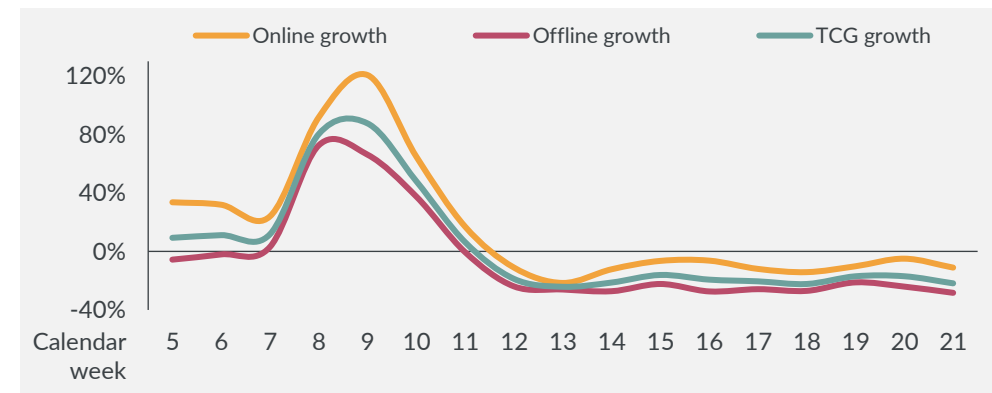
Brazil

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 21 (May 23 – May 29)

- The total TCG market continued its negative trend (-22%), driven by traditional retail at -28%. Online sales performed better but were still down by 11%.
- The most impacted product groups were media tablets and smart-phones at -36% each. Desk computing was up 30%.
- Audio home systems posted an outstanding growth of +74% while MDAs were down 19%. SDA products delivered a mixed picture with food preparation at +23% and dental care at -8%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 21 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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Italy

Spain

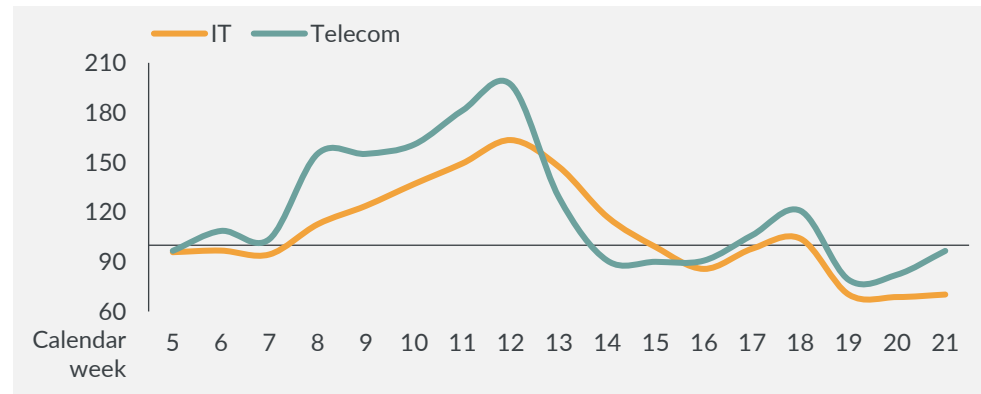
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> Japan

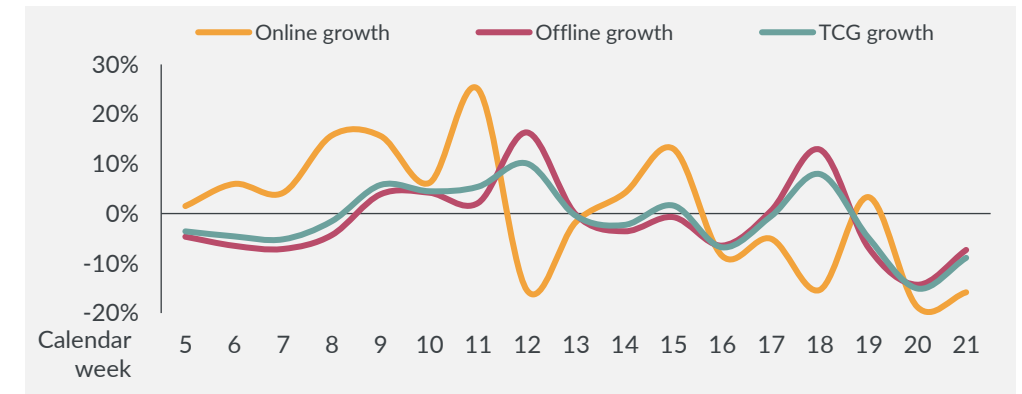
Brazil

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 21 (May 23 – May 29)

- Deceleration in traditional retail (-7%) dragged the total TCG market down by 9%. Online sales added to it by delivering -16%.
- Headsets (+25%) and smartphones (+11%) posted growth while mobile computing and media tablets were down at -15% and -30%.
- MDA/SDA/CE products witnessed negative trends ranging from -43% for air treatment to -8% for washing machines and -4% for hot beverage makers. Cooling was the only product group with a positive trend of +5%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 21 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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Italy

Spain

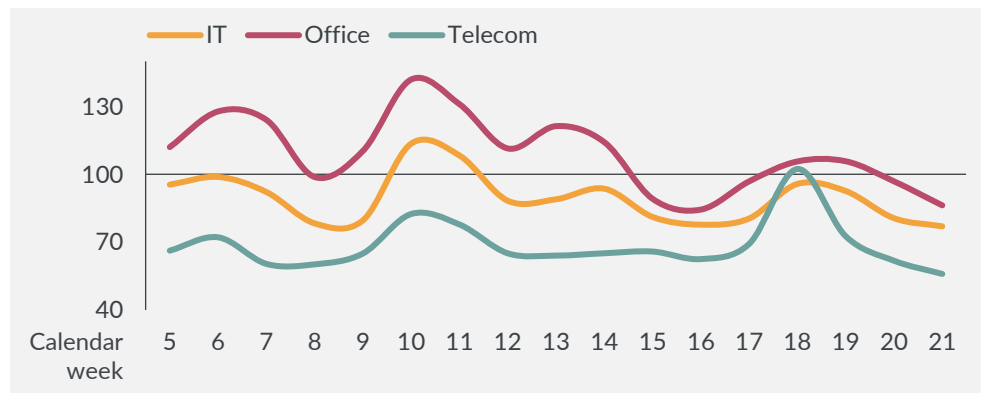
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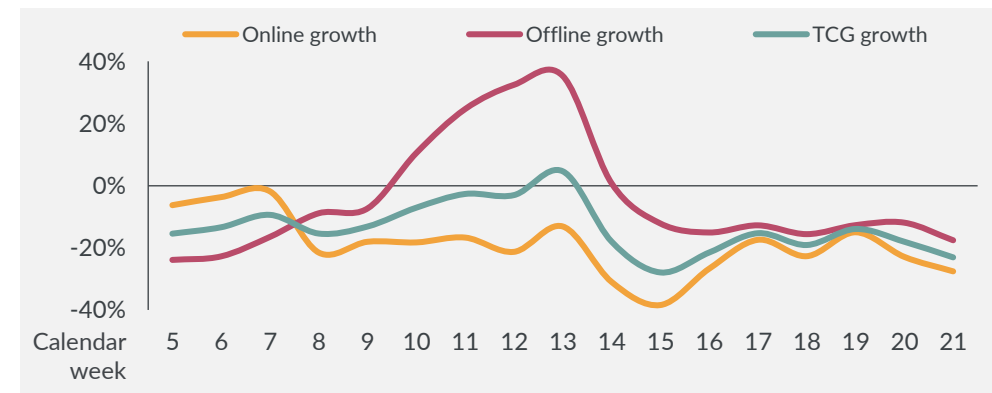
> Brazil

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 21 (May 23 – May 29)

- Solid decreases for both traditional retail (-18%) and online sales (-28%) delivered a negative trend (-23%) for total TCG.
- The rates for IT/Office and telecom products ranged from -40% for smartphones to -13% for desk computing. Laser printers were the standout at +2%.
- The mixed picture for MDA/SDA/CE product groups delivered single-digit positive trends for washing machines and TVs. SDAs were negative throughout.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 21 2022; 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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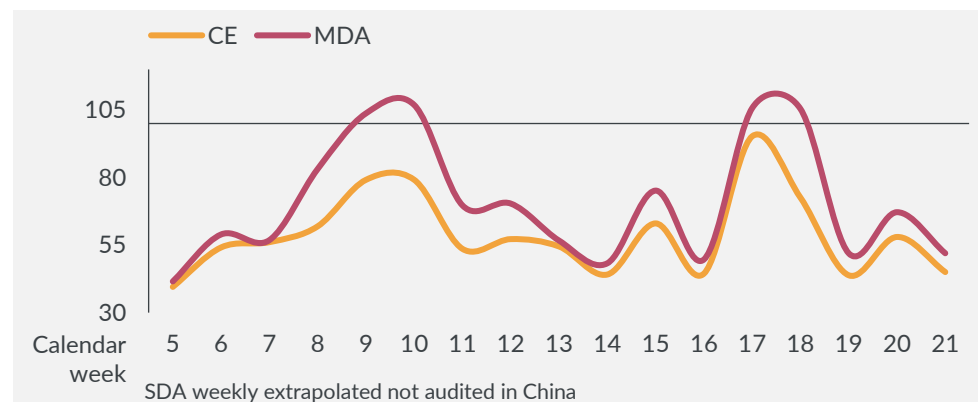
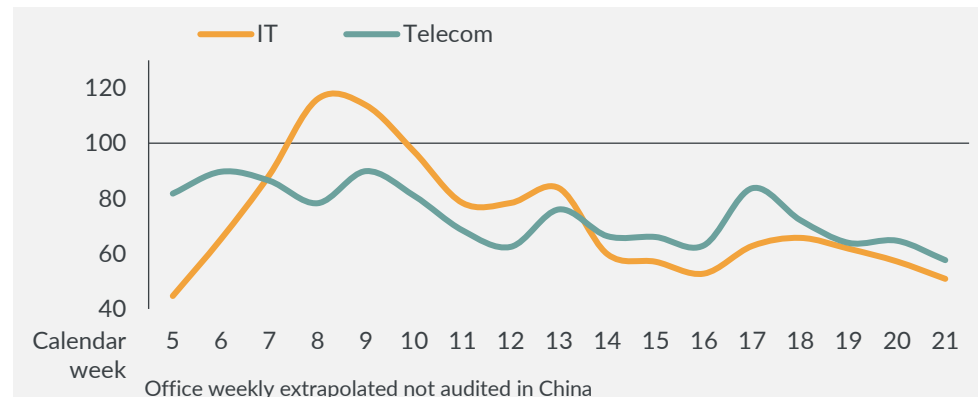
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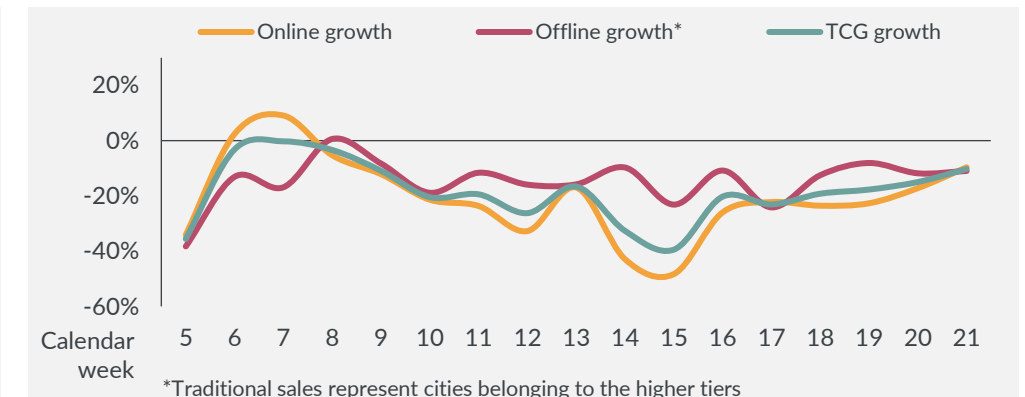
Brazil

> China

Index: 2021 average weekly turnover in EUR = 100



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



Key take aways in calendar week 21 (May 23 – May 29)

- Both distribution channels continued to fall week-on-week with nearly identical rates of -10% and -11%, leading to a downswing of the total TCG market of 10%.
- Mobile PCs posted an increase of 33%. Smartphones delivered a minus of 17%.
- Week 21 saw a double-digit drop for TV sales (-13%) while washing machines and cooling accelerated by 7% and 8% respectively.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 21 2022; 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



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