



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 112

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> About gfknewron

Fact of the week

Germany

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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:

PTV Switchover in Italy: Impact of incentivized sales



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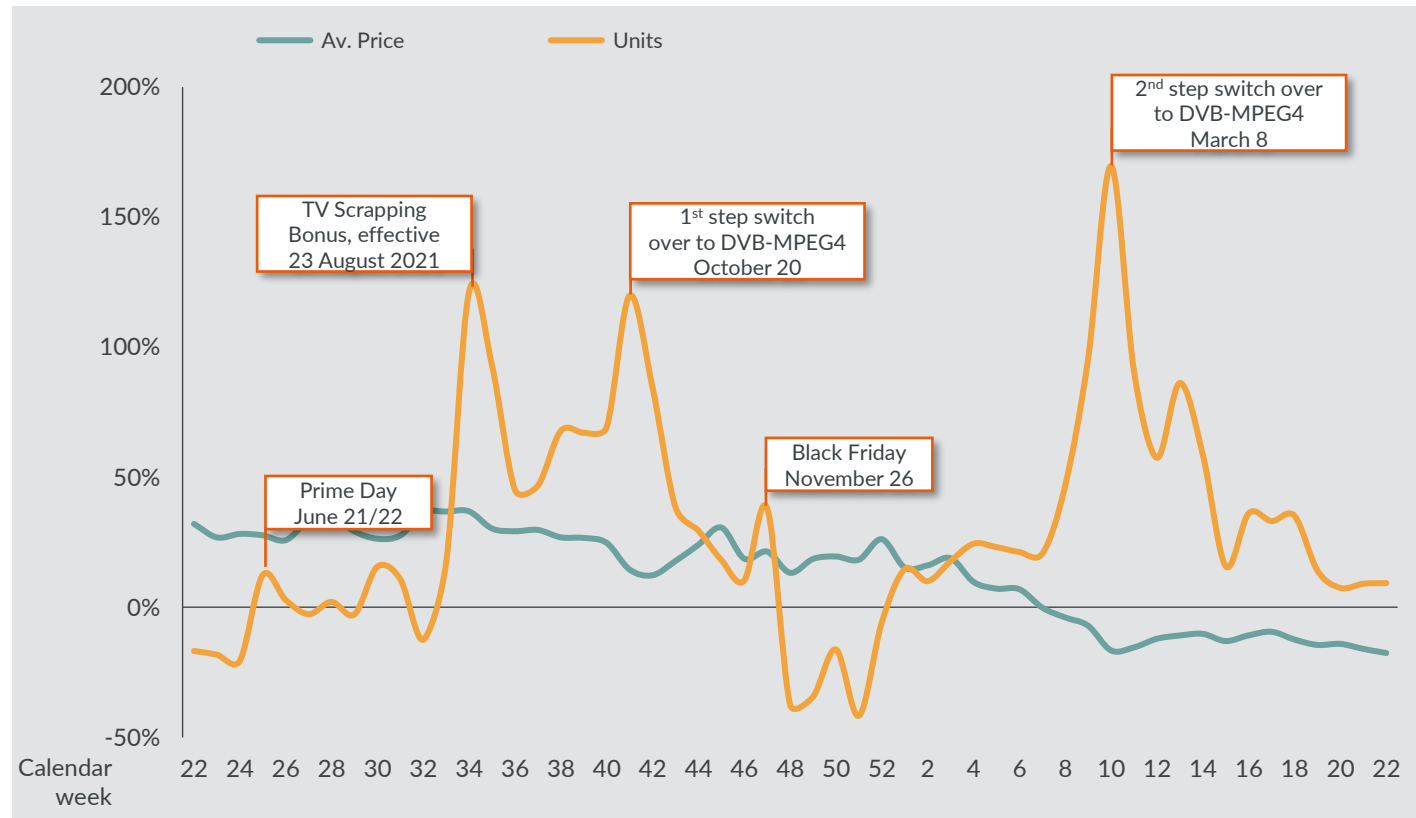
Russia

Japan

Brazil

China

Average price and unit growth +/- % YoY in Euro (NSP) growth rate vs previous year in %



Key take aways

- Incentivized sales are increasing demand in lower inch classes, decreasing overall ASP.
- The reorganization of TV channels, meaning the switch to DVB-T MPEG4 transmission system (put forward by Ministry of Economic Development), involves all national and local networks and programs in Italy.
- The national public broadcaster has realized two steps, October 20, 2021, and March 8, 2022. The switch over to DVB-T2 is planned for 2023.
- The scrapping incentive of 20% or max. 100 € is available until December 31, 2022 (or until the funds are exhausted). Plans to extend the incentive are not confirmed.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 22 2021 – 22 2022; Average price is in EUR NSP (non-subsidized price)

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



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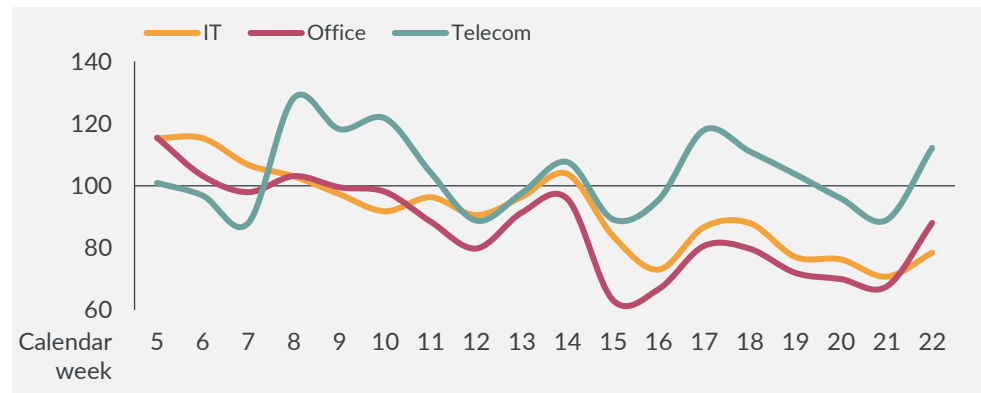
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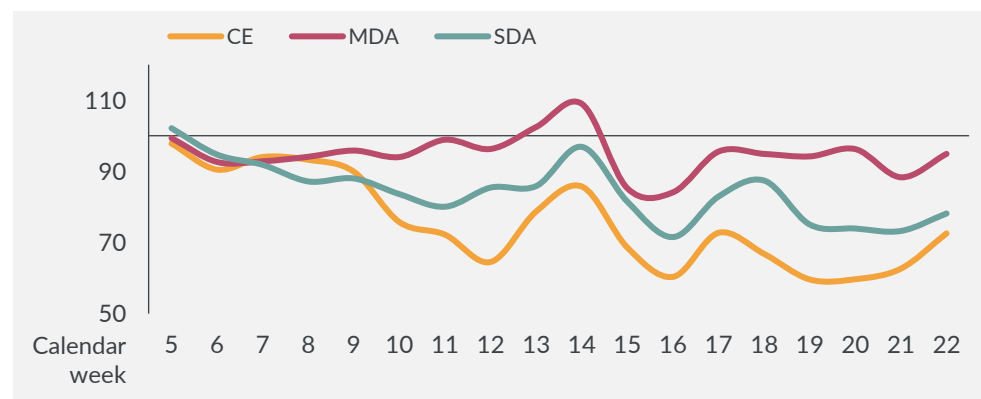
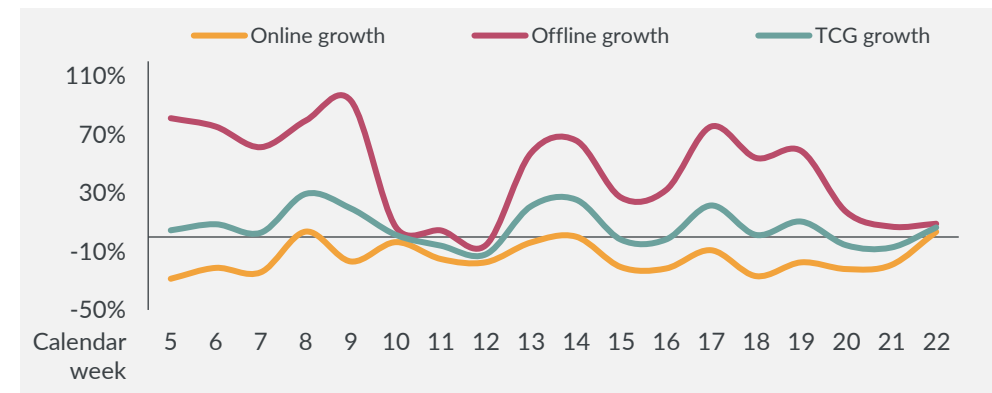
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 22 (May 30 – June 05)

- Online sales recovered from -19% in week 21 to +3% in week 22 which led to an upswing of the total TCG market of 6%. Traditional retail experienced a plus of 9% vs week 22 in 2021.
- The mixed picture for IT/Office and telecom products saw smartphones out in front at +29% and desk computing bringing up the rear at -21%.
- There were losses for most MDA/SDA/CE products except for dental care (+7%) and soundbars (+1%). Cooling was flat.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 22 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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Germany

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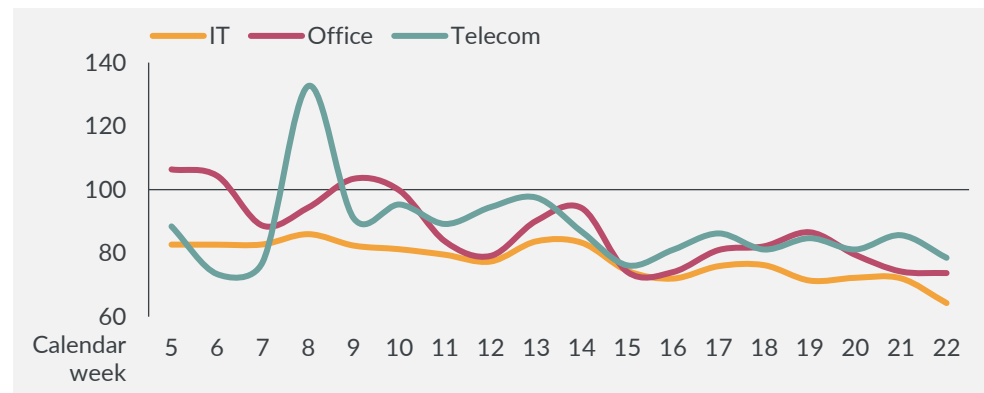
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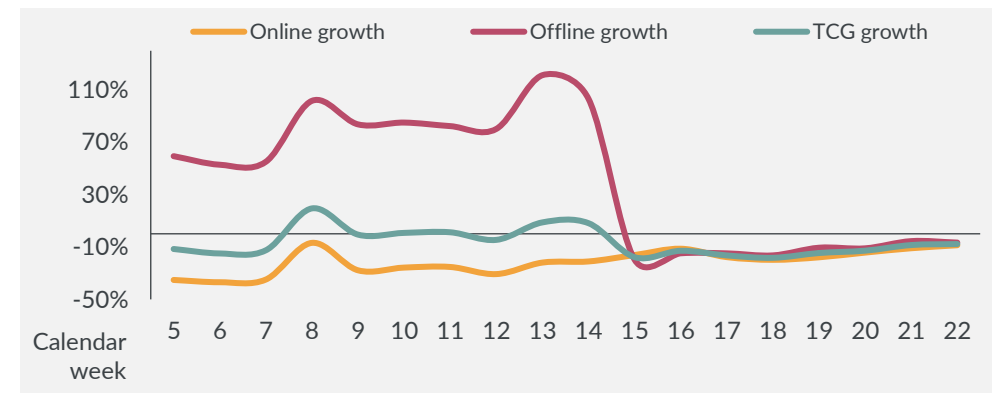
Brazil

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 22 (May 30 – June 05)

- Online sales delivered -9% (-11% the previous week) and traditional retail was down -7% (-5% the previous week), resulting in a downswing of the total TCG market of -8%.
- Most IT/Office products were double-digit negative, led by media tablets at -29%. Smartphones lagged at -14%.
- Most SDA/CE products experienced recovery and turned positive except shavers which dropped from +8% in week 21 to +2% in week 22. Cooling and washing machines slumped at -14% and -10%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 22 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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Italy

Spain

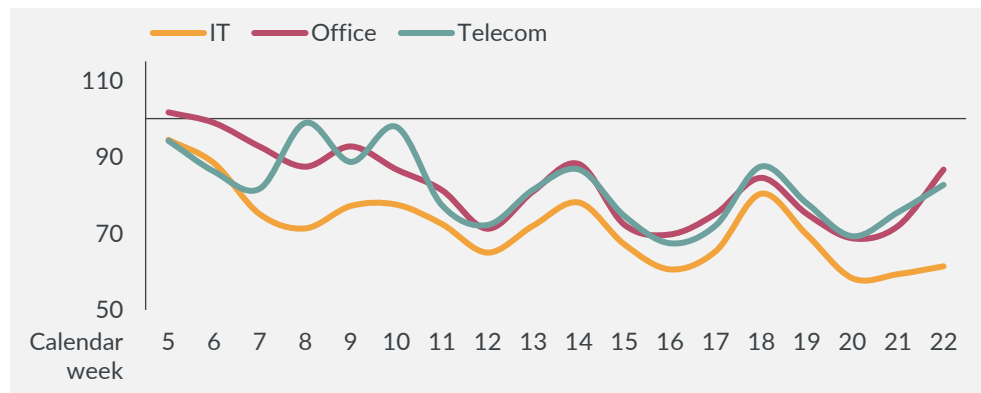
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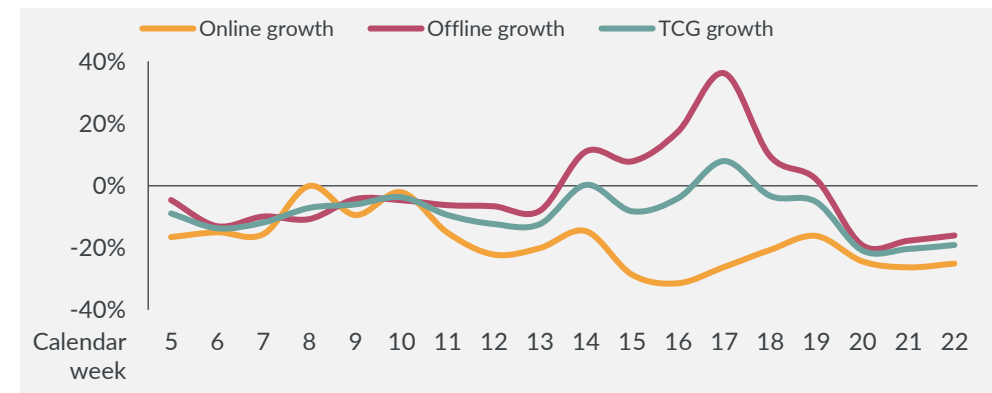
Brazil

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 22 (May 30 – June 05)

- Online sales delivered -25% (-26% the previous week) and traditional retail was down -16% (-18% the previous week), resulting in a downswing of the total TCG market of 19%.
- IT/Office products were double-digit negative, led by desk computing at -38%. Smartphones slumped at -10%.
- Except for dental care at +17%, most other MDA/SDA/CE products posted double-digit negative trends with soundbars in the lead at -38%. Hot beverage makers were single-digit negative at -9%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 22 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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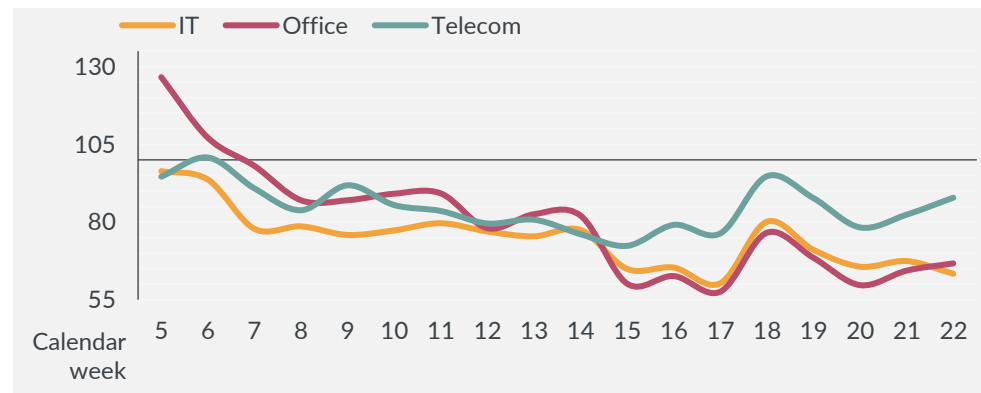
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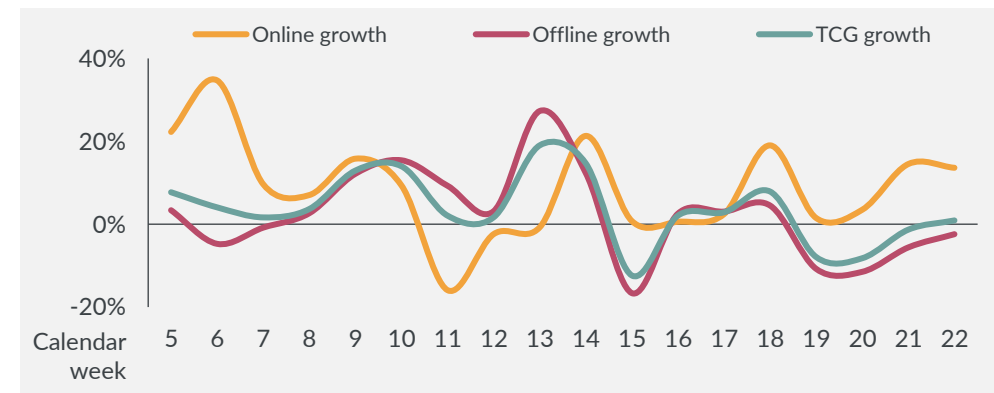
Brazil

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 22 (May 30 – June 05)

- The total TCG market grew by 1%, driven by online sales which were up 14%. Traditional retail posted a slight decline of 2%.
- IT/Office products ranged from -25% for desk computing to -5% for media tablets. Smartphones accelerated at +9%.
- Air treatment still delivered substantial growth of 48%, although down from +138% in week 21. Cooling (+22%) and shavers (+14%) posted positive results. Food preparation and audio home systems came in last place at -14% and -28% respectively.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 22 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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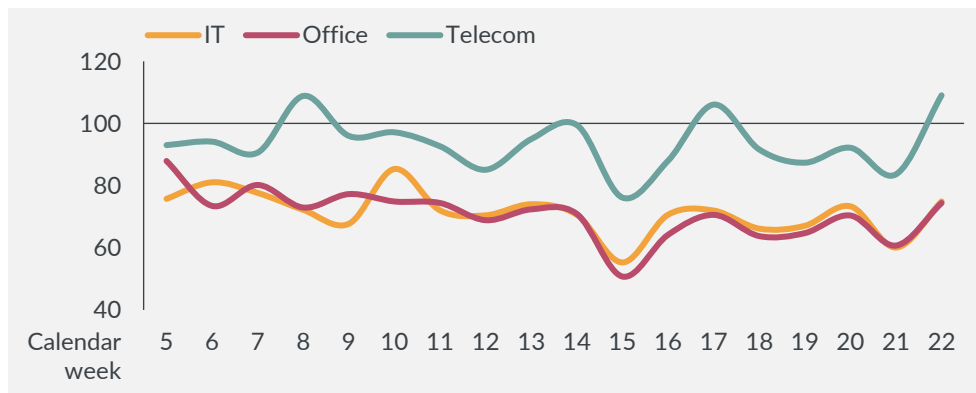
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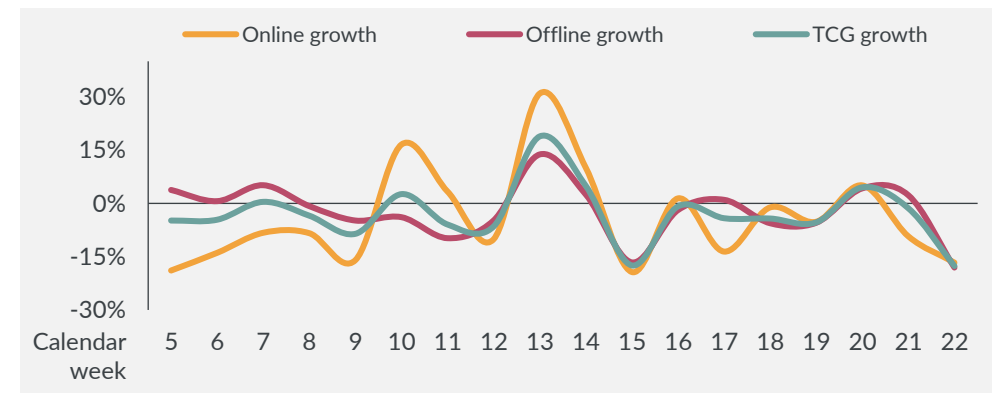
Brazil

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 22 (May 30 – June 05)

- Remarkable drops in both distribution channels of 17% and 18% led to a downswing of the total TCG market of 18%.
- Desk computing suffered the most at -49% and laser printers and smartphones the least at -10% each. Headsets were the best performing product group at +8%.
- All MDA/SDA/CE products posted negative trends with TV in the lead at -31%. MDAs and soundbars posted single-digit drops of 4%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 22 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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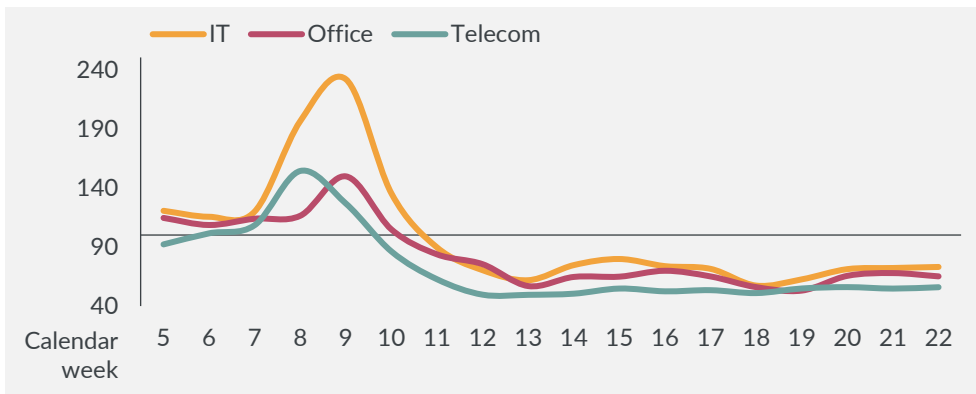
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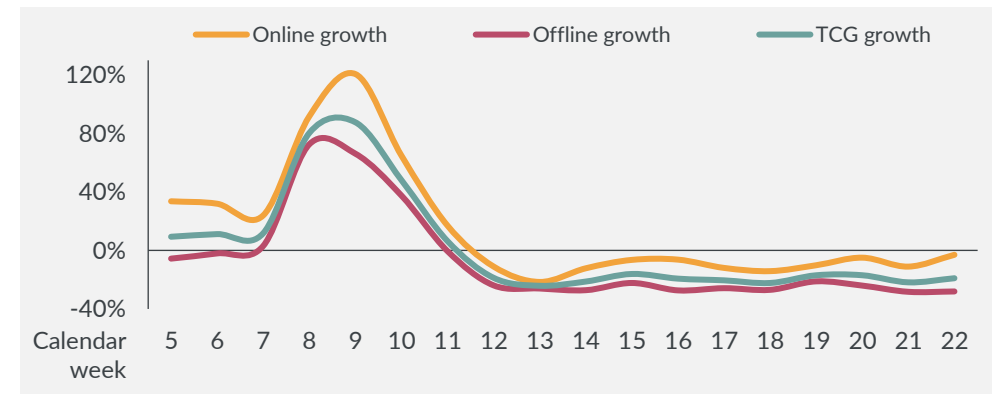
Brazil

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 22 (May 30 – June 05)

- The total TCG market continued its negative trend (-19%), driven by traditional retail at -28%. Online sales performed better but were still down by 3%.
- The most impacted product groups were media tablets at -36% and smartphones at -33%. Desk computing and keyboards were up 18% each.
- Audio home systems posted an outstanding growth of +114% while MDAs were down 15%. SDAs delivered a mixed picture.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 22 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 Japan



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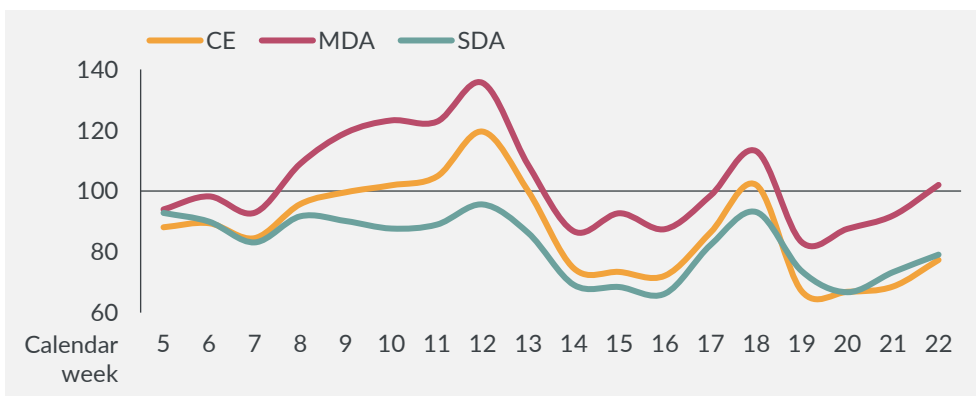
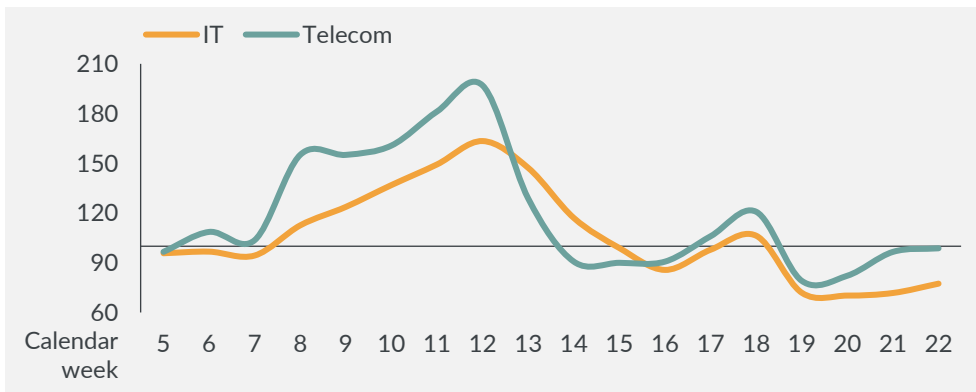
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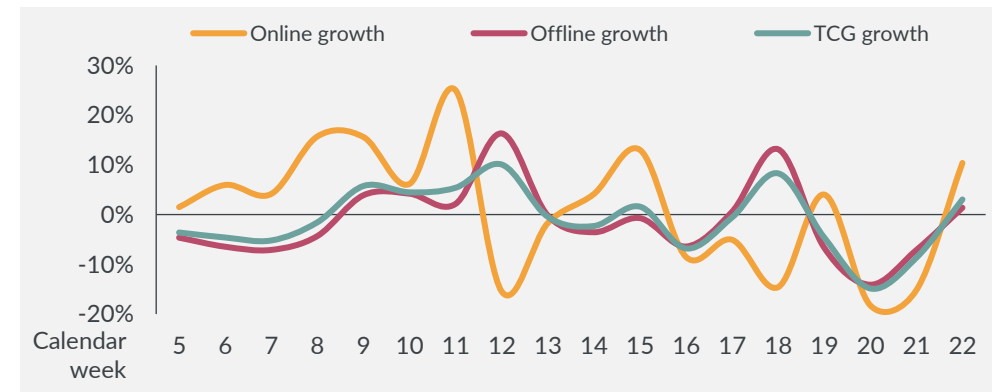
Brazil

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 22 (May 30 – June 05)

- The recovery of both distribution types, traditional retail +1% and online sales +10%, led to a plus of 3% for the total TCG market.
- Headsets (+30%) and smartphones (+49%) posted remarkable growth while mobile computing and media tablets were down at -4% and -27% respectively.
- While MDAs were up 7% and CE products witnessed -13%, SDAs showed a mixed picture ranging from -26% for air treatment to +21% for hot beverage makers.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 22 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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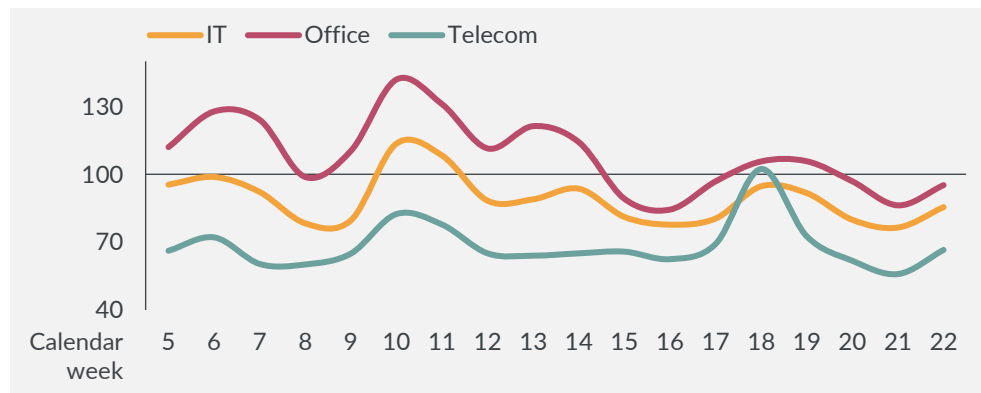
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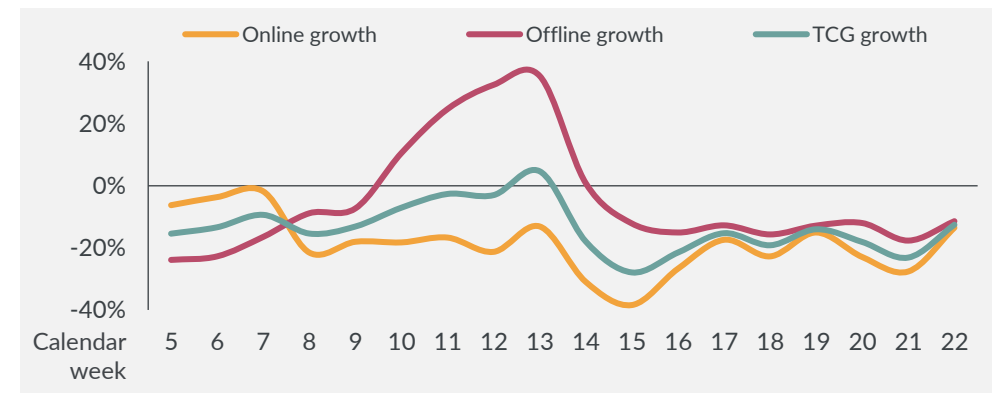
> Brazil

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 22 (May 30 – June 05)

- Solid decreases for both traditional retail (-11%) and online sales (-14%) delivered a negative trend (-13%) for total TCG.
- The rates for IT/Office and telecom products ranged from -32% for smartphones to +34% for laser printers. Desk computing was flat.
- MDA/SDA/CE product groups delivered positive trends throughout, posting +22% for TV sales and +18% for washing machines. Food preparation lagged at +2% and shavers at +3%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 22 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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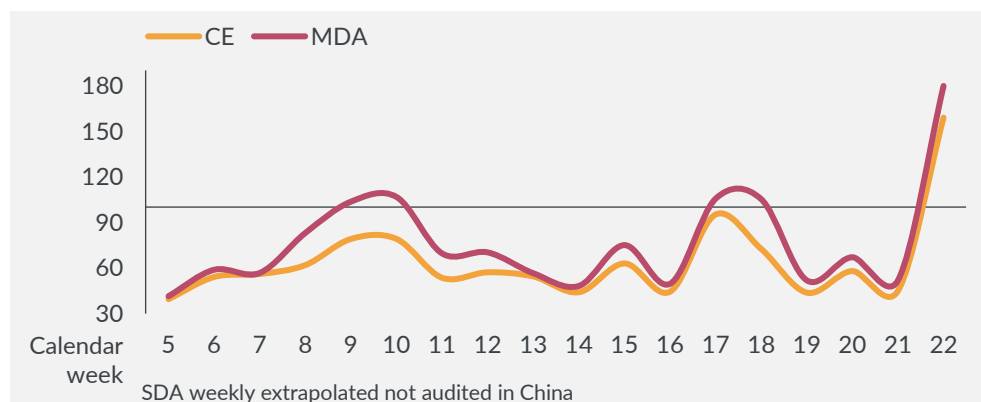
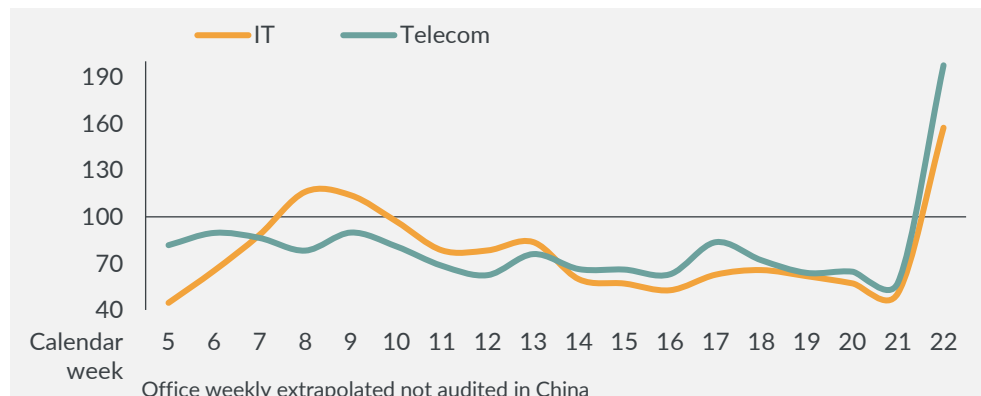
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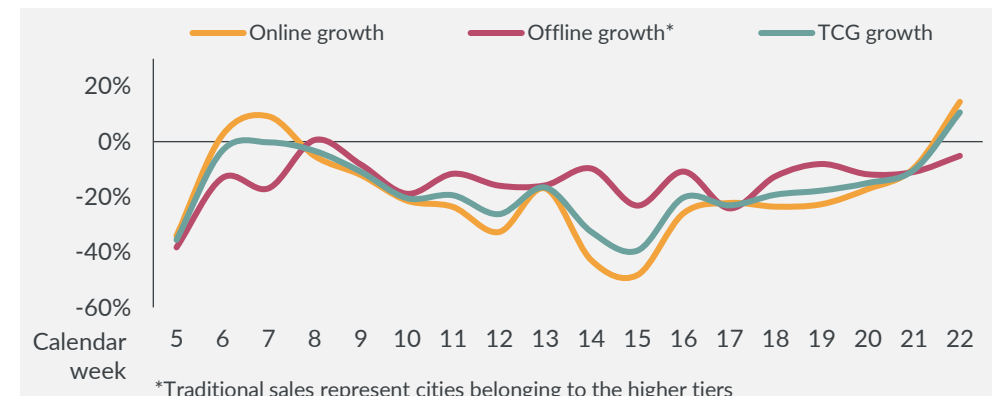
Brazil

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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 22 (May 30 – June 05)

- As the 618 Shopping Festival started, online sales saw a turnaround with growth of 14%, lifting the total TCG market to +11%. Traditional retail declined by 5%.
- Mobile computing posted growth of 8%. Smartphone sales experienced a plus of 14%.
- Refrigerator sales accelerated by 7% while washing machines lagged at -2%, down from +7% in week 21. TV sales posted a slight decline of 1%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 22 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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