



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 115

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> About gfknewron

Fact of the week

Germany

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Fact of the week: Chinese brands grow their share in Russia



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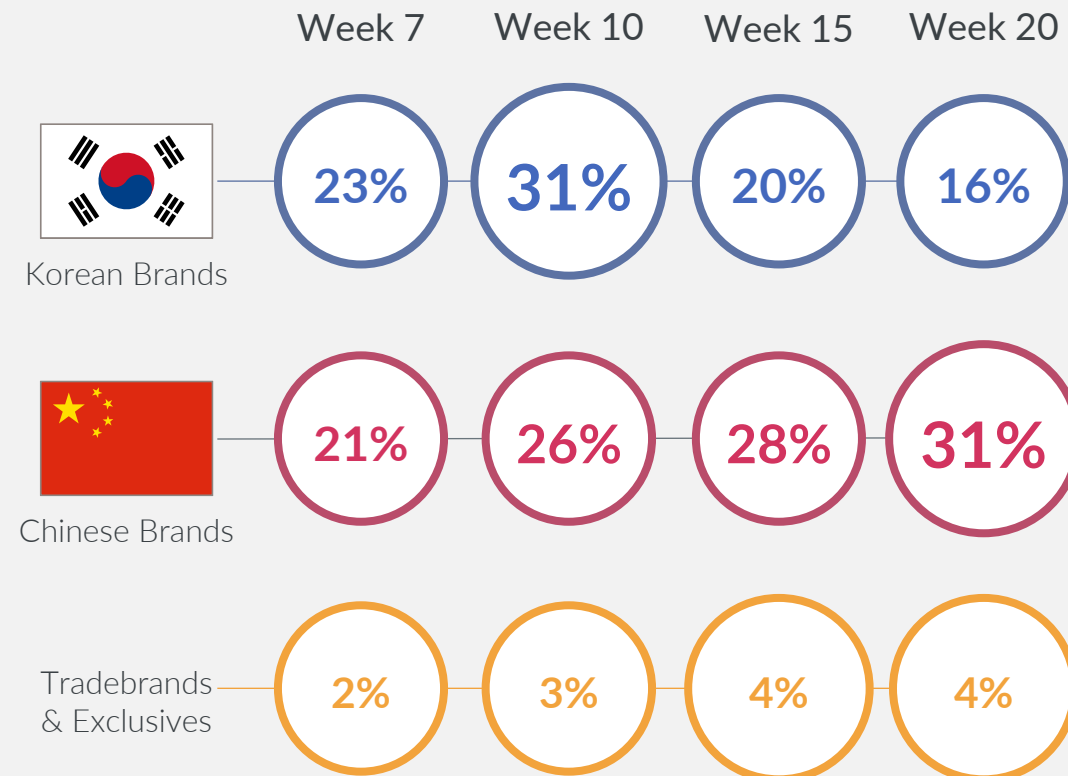
Brazil

China

Growth rate vs week 1 2022 in % Week 1 – 20 2022 | Russia



Sales value USD shares Week 1 – 20 2022 | Russia



Source: Market Intelligence: Sales Tracking, Top 22 Tech&Durable product groups, weekly data, calendar week 1 – 20, 2022

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



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).

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

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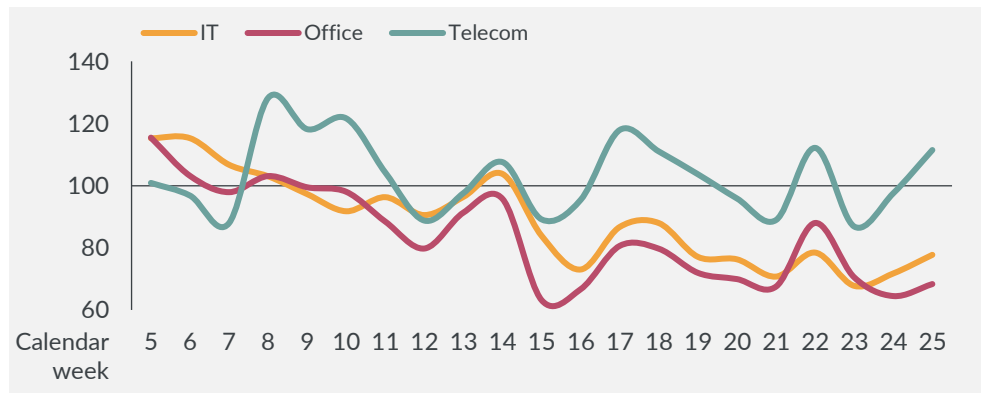
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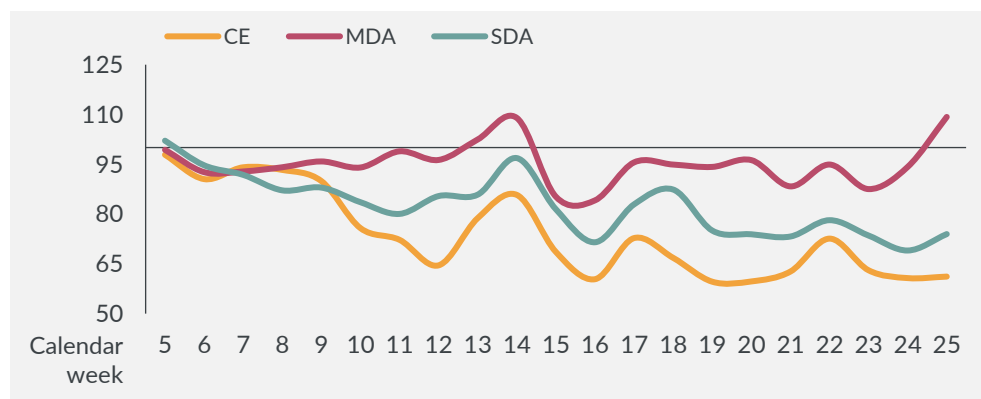
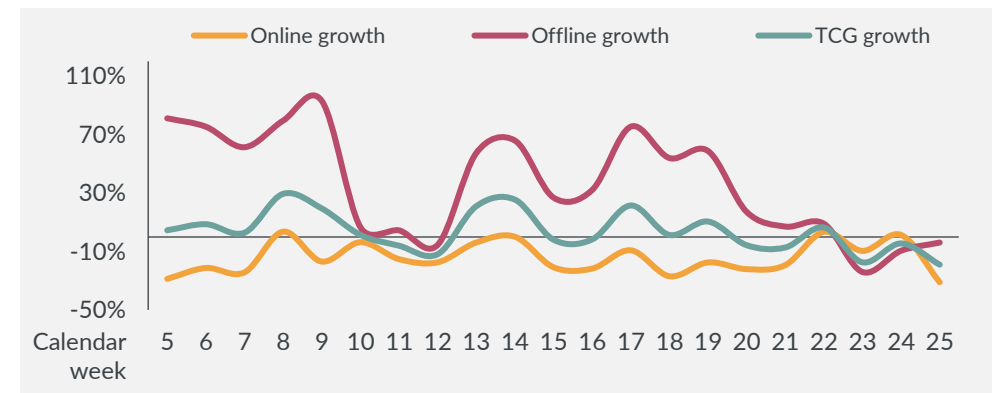
Brazil

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 25 (June 20 – June 26)

- There was a sharp drop in online sales from +1% in week 24 to -31% in week 25. Prime Day happened this week in 2021, but not in 2022. This led to a decline of 19% in the total TCG market.
- All IT/Office product groups decelerated in double digits, led by laser printers at -46%. Smartphone sales were up by 3%.
- There were remarkable double-digit losses for all MDA/SDA/CE products with shavers (-50%) and dental care (-48%) out in front.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 25 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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France

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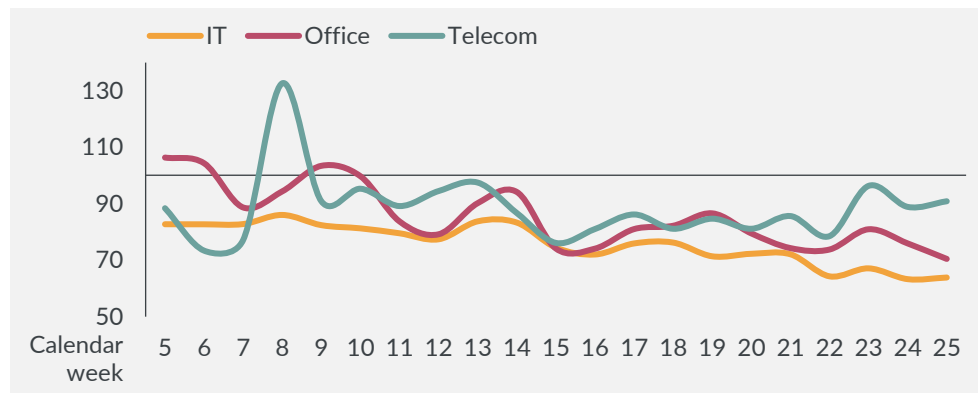
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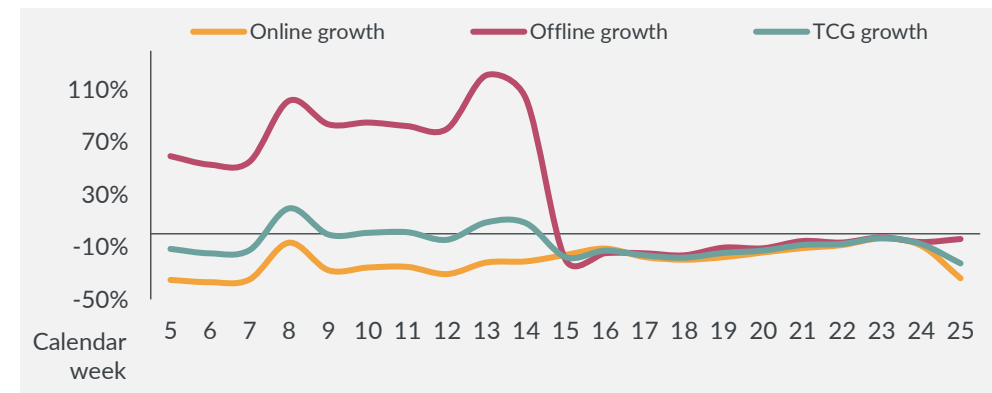
Brazil

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 25 (June 20 – June 26)

- Online sales delivered -34% (-9% the previous week) and traditional retail was down -4% (-6% the previous week), resulting in a downswing for the total TCG market of -23%.
- All IT/Office and telecom products posted negative trends, led by mice at -57%. Smartphones were the least hit at -4%.
- MDA/SDA/CE products experienced solid double-digit losses, ranging from -58% for dental care to -11% for both cooling and washing machines. TV sales declined by 32%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 25 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

Germany

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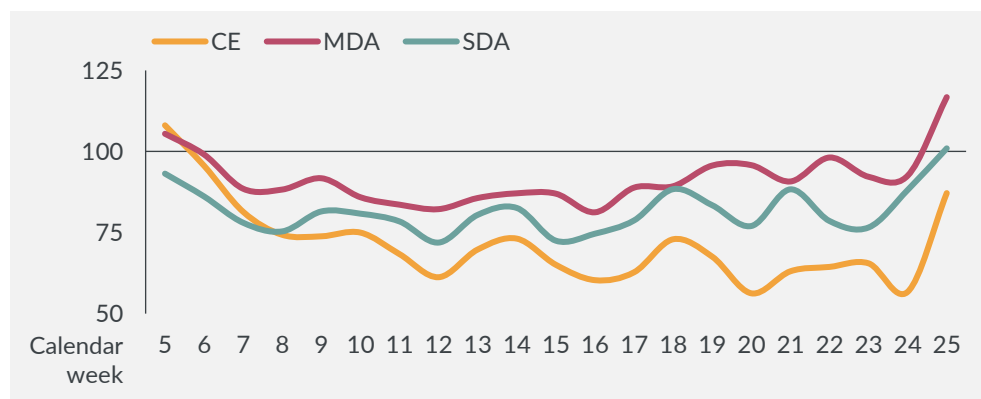
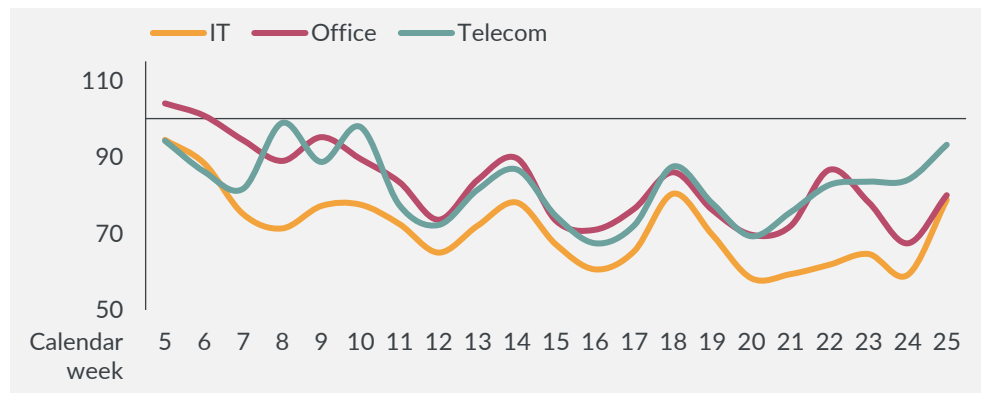
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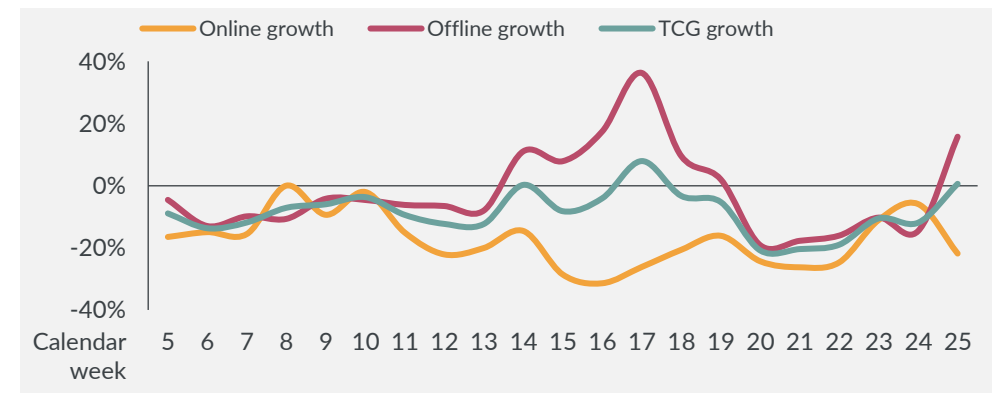
Brazil

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 25 (June 20 – June 26)

- Traditional retail recovered to +16%, up from -15% in week 24, balancing the drop of online sales (-22%, down from -6%). The total TCG market posted a slight plus of 1%
- Most IT/Office and telecom products posted negative trends with the exception of mobile computing at +4% and inkjet printers at +10%.
- MDA/SDA/CE products delivered a different picture with mostly positive growth apart from shavers at -16% and dental care at -7%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 25 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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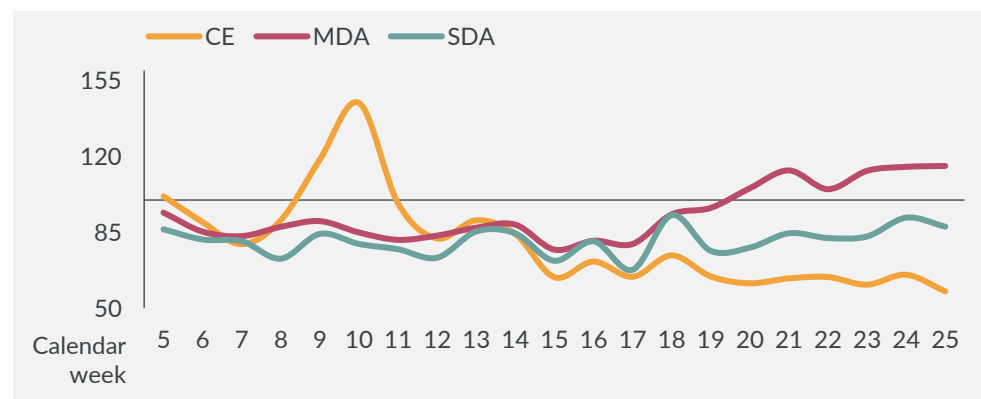
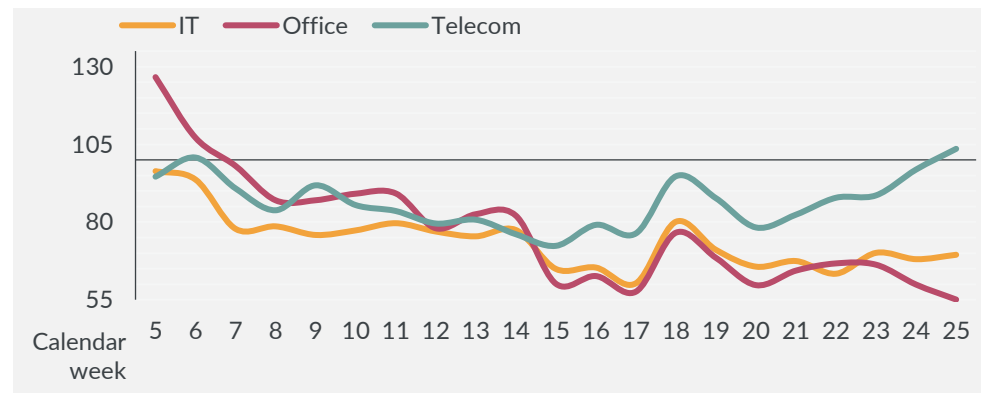
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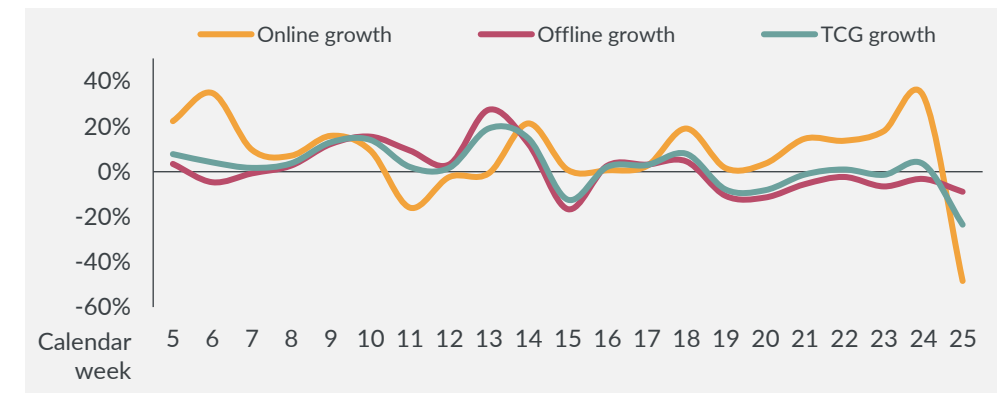
Brazil

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 25 (June 20 – June 26)

- Strong losses for online sales (-48%) led to a downswing of the total TCG market of 23%. Traditional retail posted -9%.
- IT/Office and telecom products ranged from -49% for laser printers to -12% for smartphones.
- SDA and CE products witnessed severe losses with shavers posting -50% and hot beverage makers -23%. Only MDA products were hit less strongly with cooling at -9% and washing machines at -7%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 25 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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Fact of the week

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Italy

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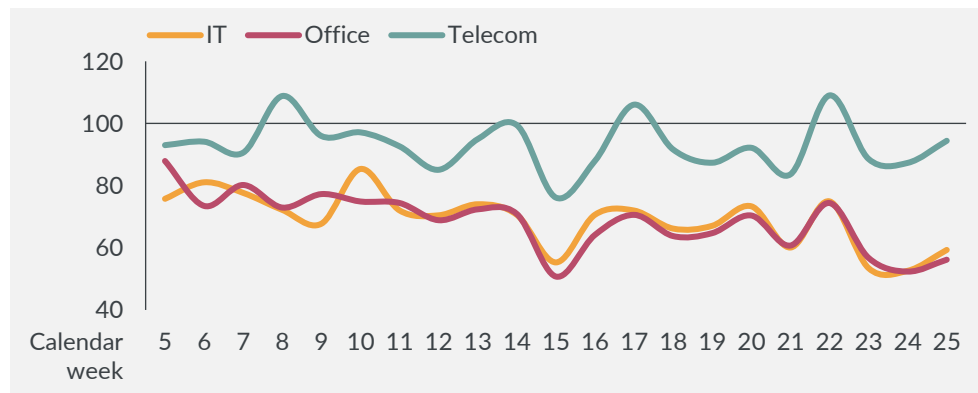
Russia

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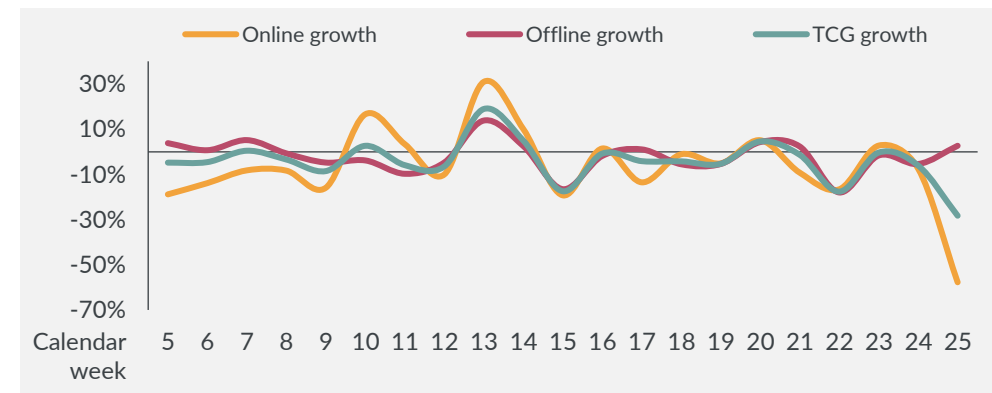
Brazil

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 25 (June 20 – June 26)

- Due to the shift of Prime Day to week 25 2021, online sales were impacted the same week in 2022, showing -58%, leading to a decline of the total TCG market of 28%. Traditional retail was up 3%.
- Laser printers were the best performing product group among IT/Office and telecom products at +9%. Desk computing and mobile computing slumped at -45% and -49% respectively.
- MDA posted positive trends while SDA and telecom products were negative throughout with shavers out in front at -52%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 25 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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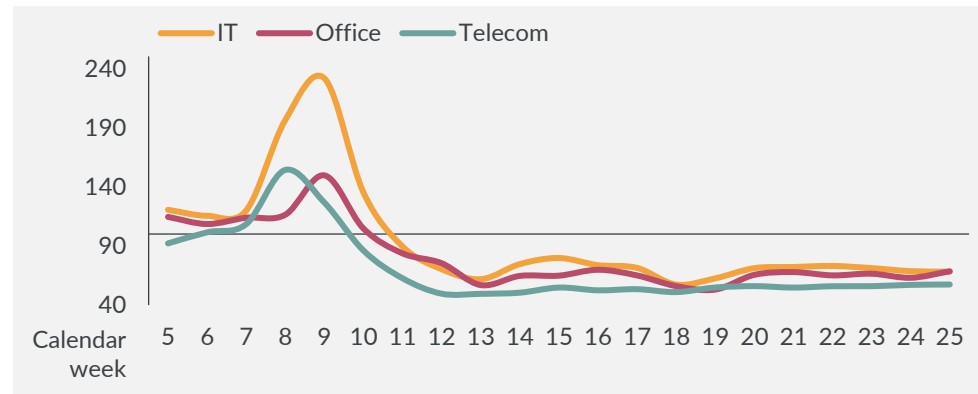
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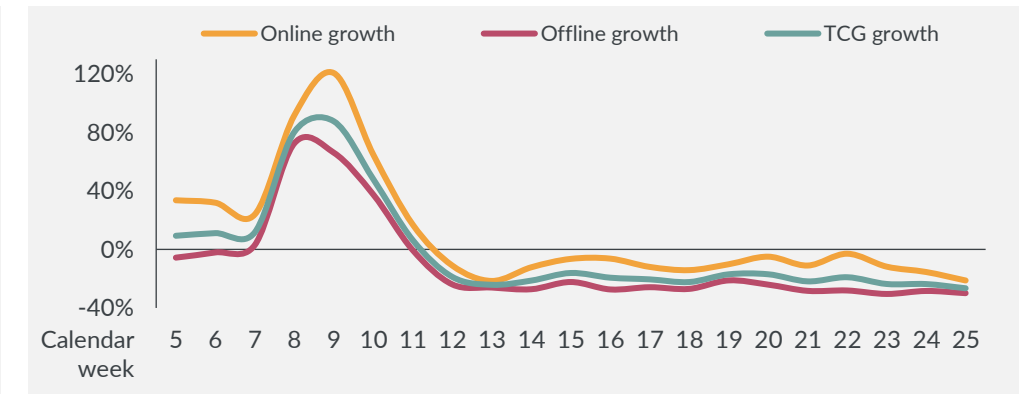
Brazil

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 25 (June 20 – June 26)

- The total TCG market continued its negative trend (-26%), driven by traditional retail at -30%. Online sales performed slightly better but were still down by 21%.
- The most impacted product groups were media tablets and smart-phones at -42% and -40% respectively. Desk computing was up 16%.
- Audio home systems posted an outstanding growth of +67% while MDAs and most SDA products delivered negative trends with air treatment in the lead at -68%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 25 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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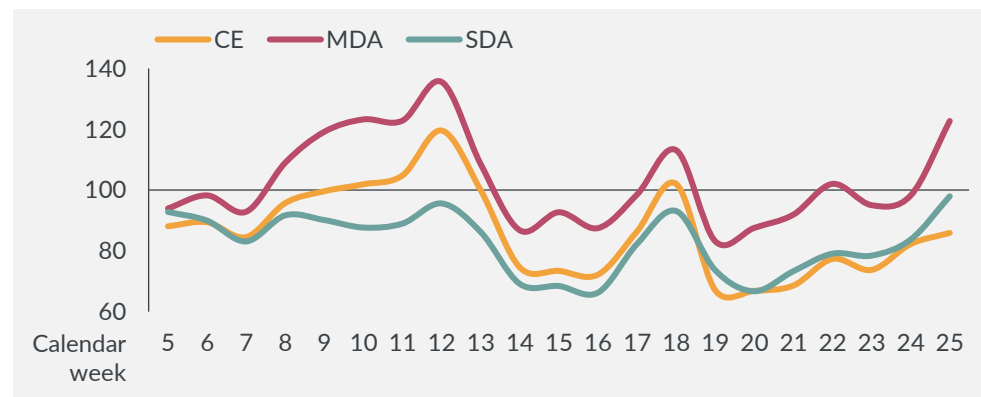
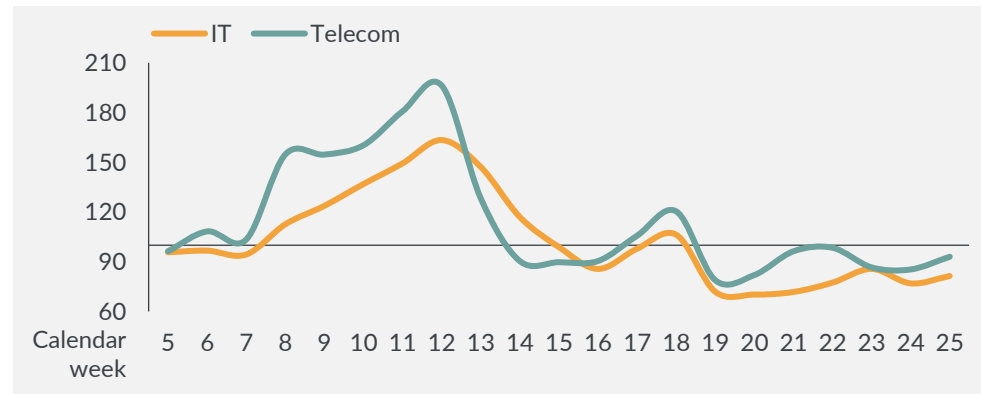
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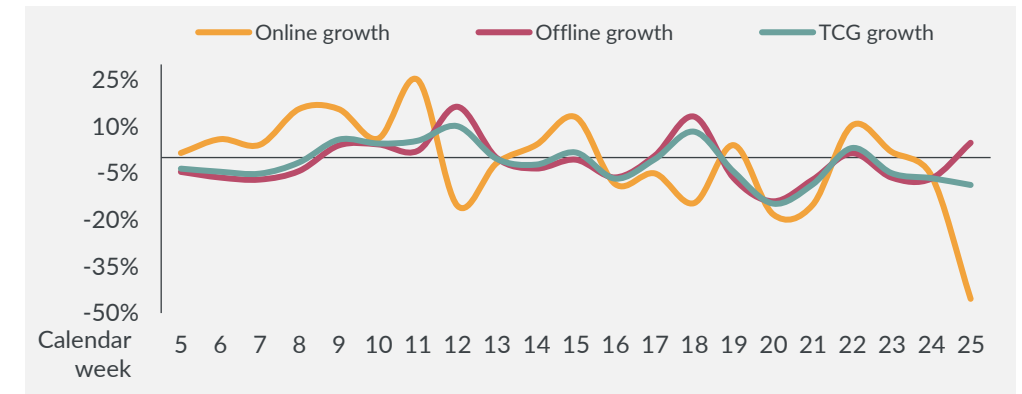
Brazil

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 25 (June 20 – June 26)

- Although traditional retail (+5%) turned positive, the total TCG market lost 9% due to exceptional losses for online sales (-45%).
- The best product group performing in IT and telecom was smartphones (+13%). Declines ranged from -20% for mobile computing to -40% for headsets.
- Cooling delivered a solid double-digit growth of 24% while SDA and CE declined in double digits, led by soundbars at -54%. Air treatment was flat.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 25 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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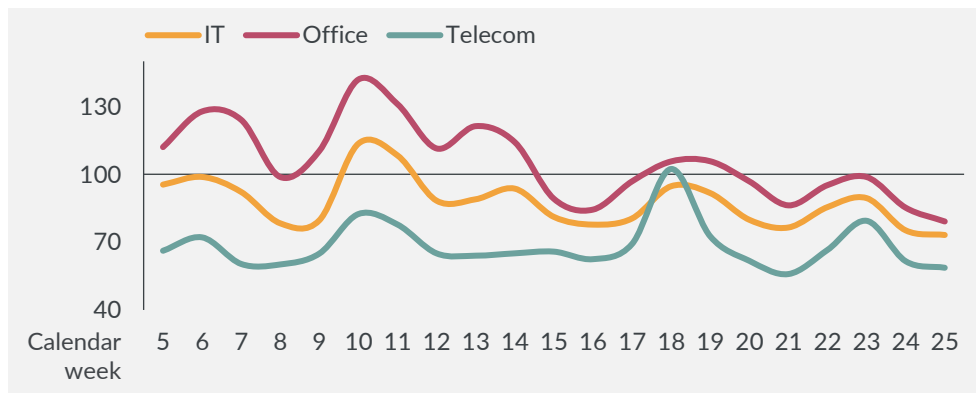
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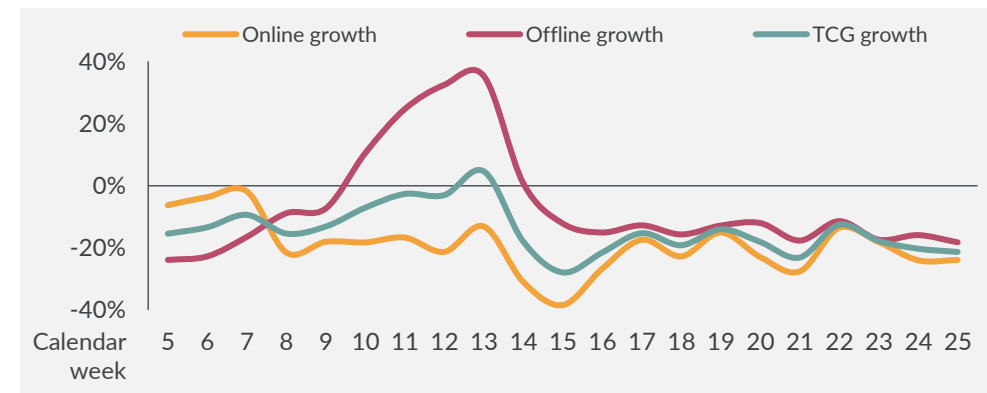
> Brazil

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 25 (June 20 – June 26)

- The major decreases for both traditional retail (-18%) and online sales (-24%) delivered a negative trend (-21%) for total TCG.
- Negative rates for most IT/Office and telecom products were led by smartphones at -35%. Laser printers posted +2%.
- SDA product groups delivered double-digit negative trends while MDAs lagged in single digits. TVs were the best performing product group in week 25 at +5%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 25 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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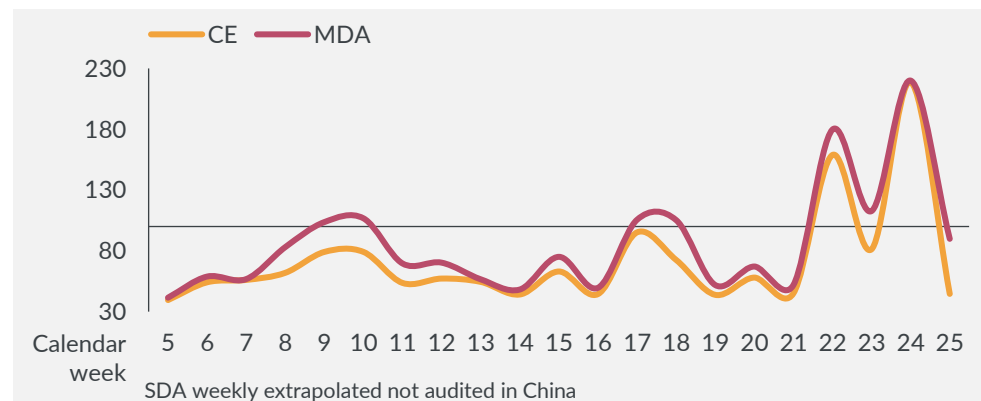
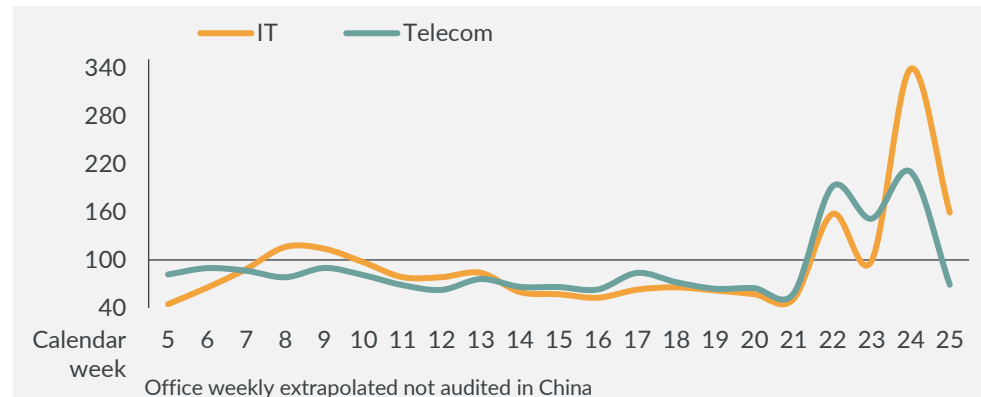
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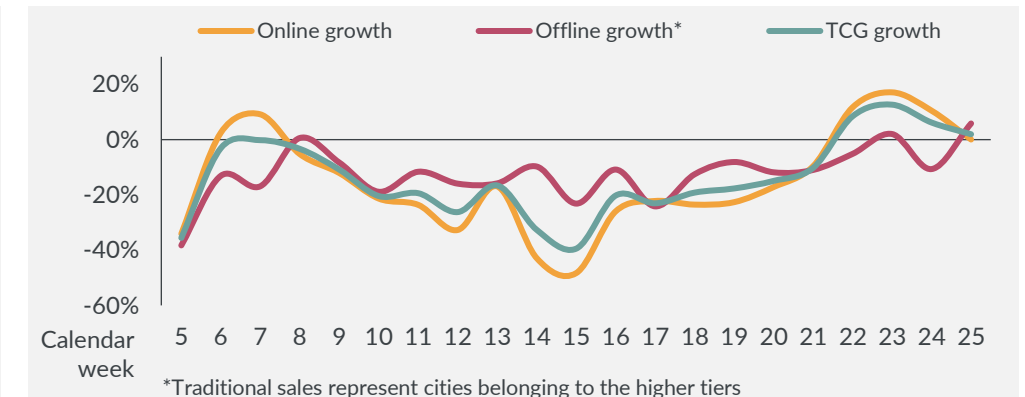
Brazil



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 25 (June 20 – June 26)

- Although traditional retail recovered from -11% in week 24 to +6% in week 25, the total TCG market accelerated by only 2% (4% points less than in week 24), impacted by flat online sales (down from +10% in week 24).
- Mobile PCs posted an outstanding increase of 125%. Smartphones delivered a minus of 22%.
- Week 25 saw double-digit uplifts for TV sales (+25%), washing machines (+17%) and cooling (+26%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 25 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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