



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 117

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> About gfknewron

Fact of the week

Germany

Great Britain

France

Italy

Spain

Russia

Japan

Brazil

China

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Fact of the week:

Higher purchase power accelerates replacements



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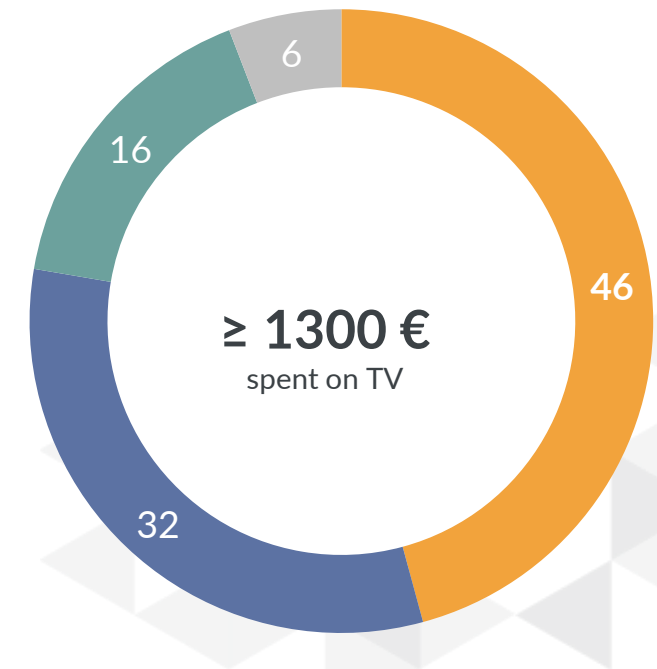
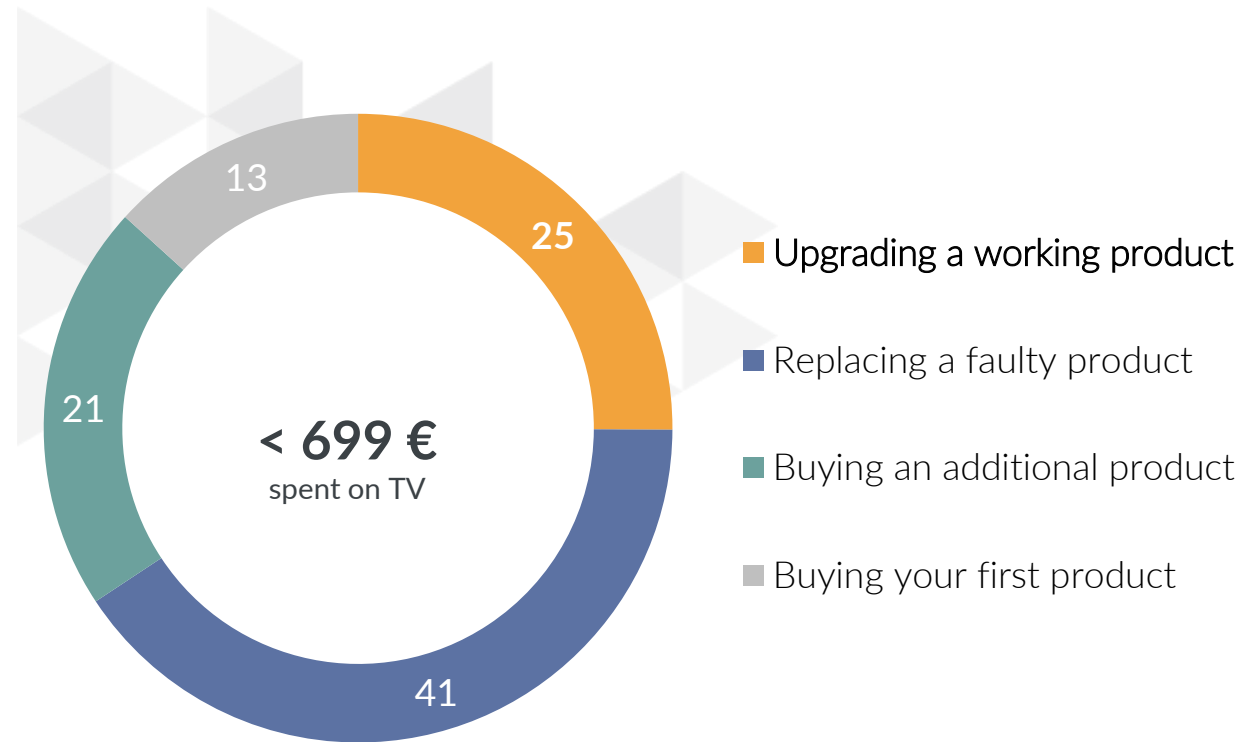
Russia

Japan

Brazil

China

gfknewron Consumer: Initial trigger for purchase TV,
all countries*, Q1 2022; respondent rate %



Source: gfknewron Consumer; *Countries: Belgium, Brazil, Chile, China, France, Germany, Great Britain, Greece, India, Italy, Japan, Netherlands, Poland, Russian Federation, Spain, Switzerland

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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Fact of the week

> Germany

Great Britain

France

Italy

Spain

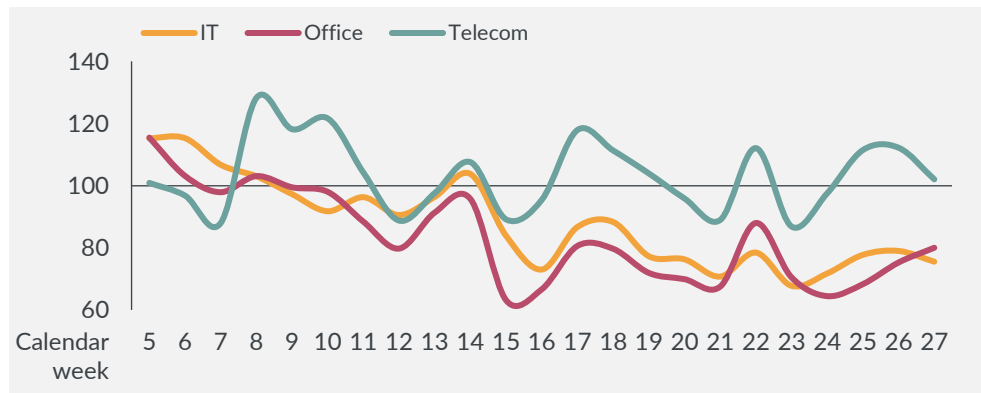
Russia

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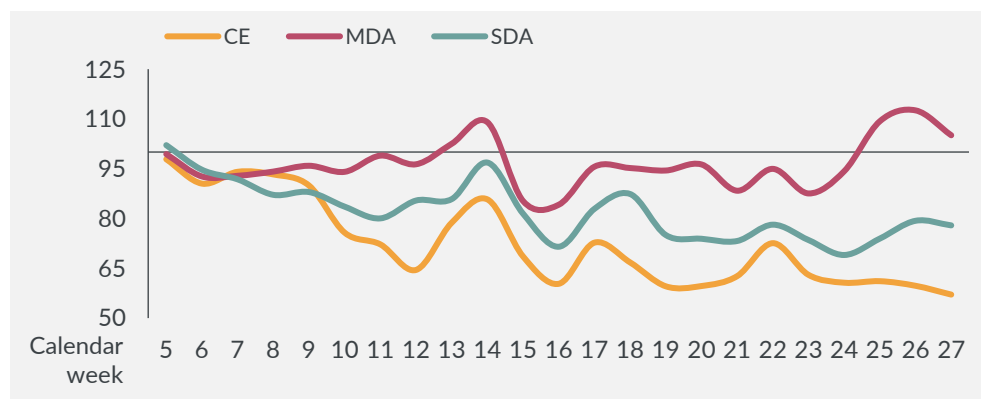
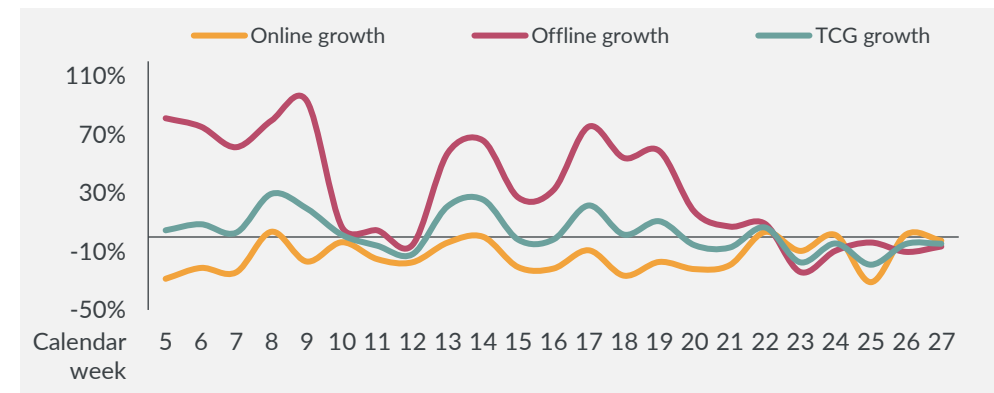
Brazil

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 27 (July 04 – July 10)

- Traditional retail experienced a minus of 7% vs week 27 in 2021. Combined with dropping online sales (-3%), this delivered a downswing for the total TCG market of 5%.
- All IT/Office product groups decelerated with laser printers falling the most at -23%. Smartphones were up by 4%.
- There were double-digit losses for CE products, food preparation, hot beverage makers, vacuum cleaners, and washing machines. Cooling was slightly down by 2%. Dental care posted +12%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 27 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

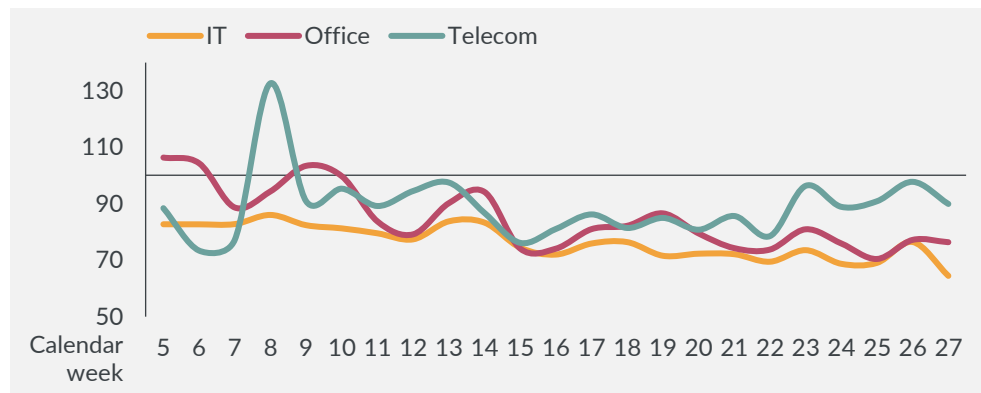
Russia

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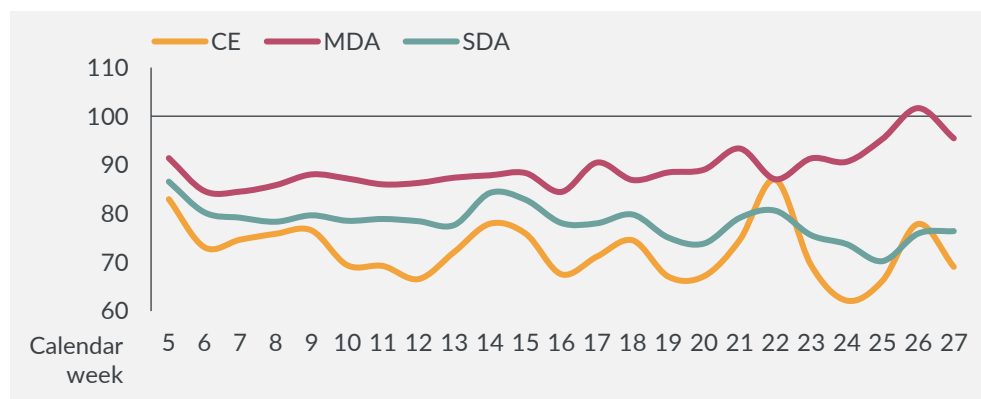
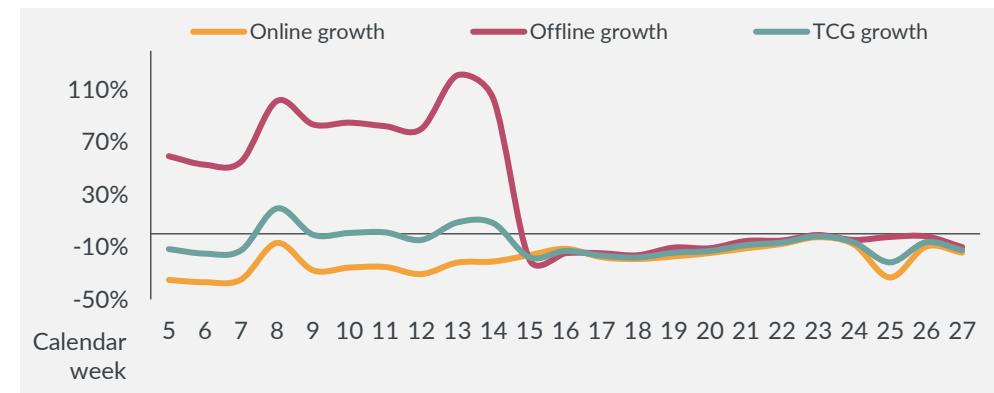
Brazil

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 27 (July 04 – July 10)

- Online sales delivered -14% (it was -10% the previous week) and traditional retail was down -10% (it was -2% the previous week), resulting in a decline for the total TCG market of -12%.
- Most IT/Office products and smartphones posted negative trends, led by media tablets at -38%. Laser printers were stable. Headsets performed the best at +4%.
- There were negative trends for most MDA/SDA/CE products, ranging from -35% for soundbars to -3% for audio home systems.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 27 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

Great Britain

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Italy

Spain

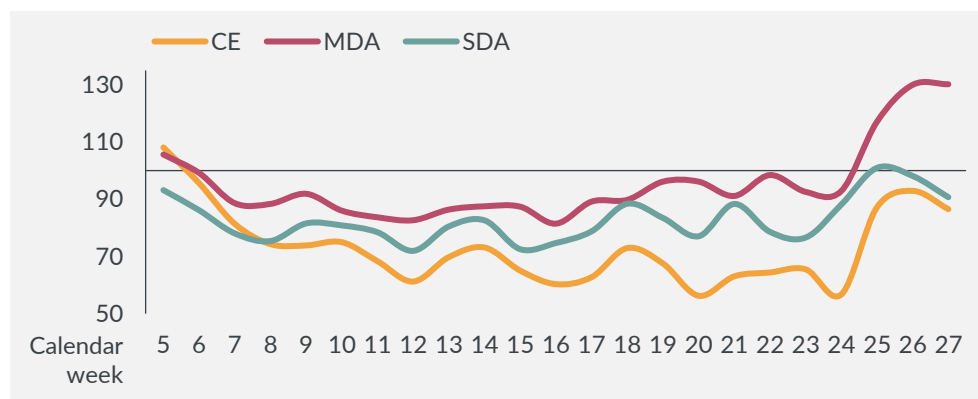
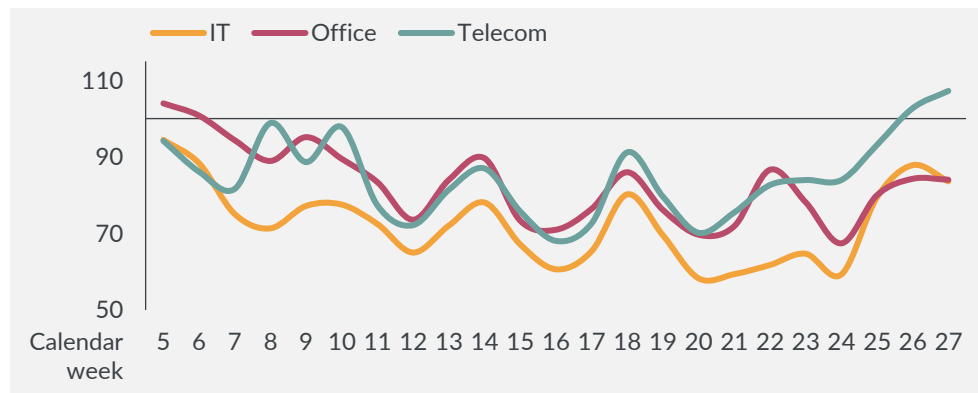
Russia

Japan

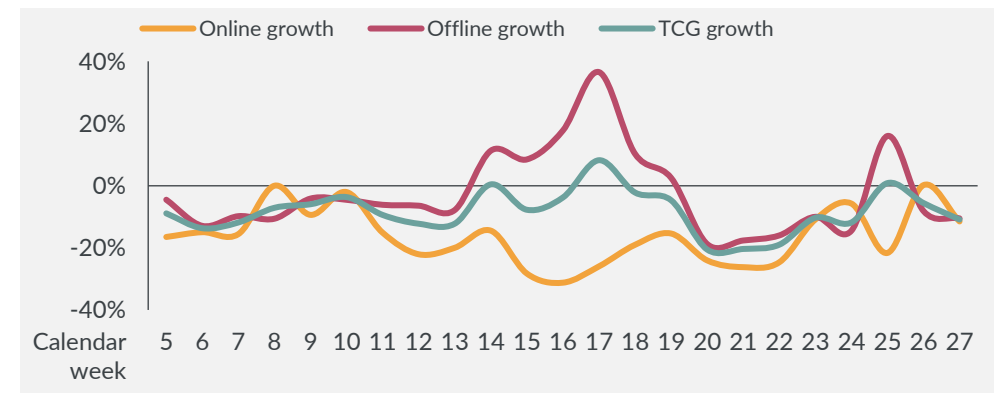
Brazil

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 27 (July 04 – July 10)

- Online sales delivered -12% (stable the previous week) and traditional retail was down -11% (-8% the previous week), resulting in a downswing for the total TCG market of 11%.
- IT/Office and telecom products experienced negative trends led by desk computing at -24%. Laser printers were stable at 0.7%.
- Air treatment saw remarkable growth of +72% and dental care accelerated at +7%. All other MDA/SDA/CE products posted negative trends with TVs and soundbars in the lead at -20% each.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 27 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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Fact of the week

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France

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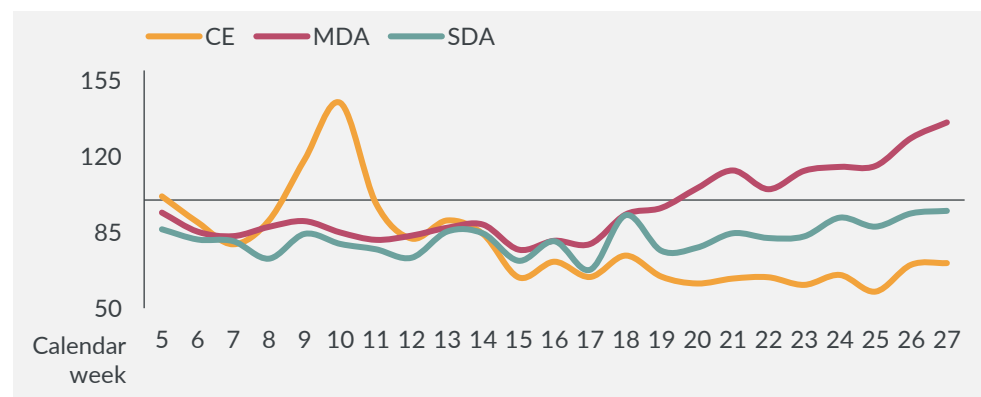
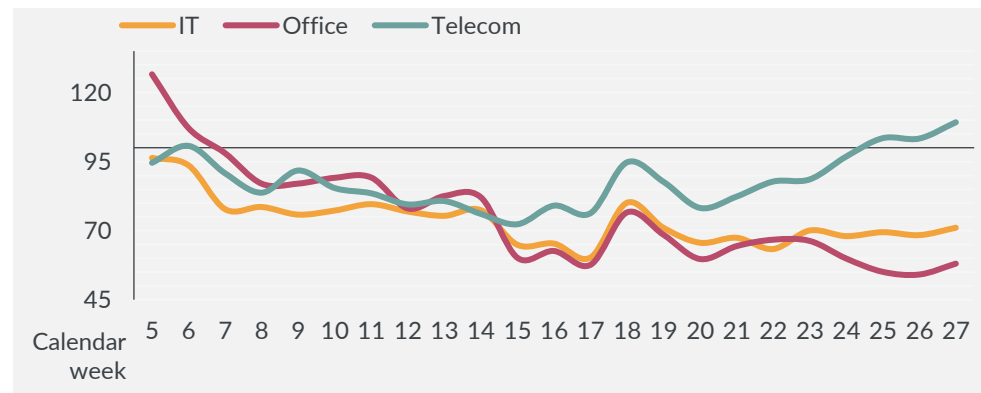
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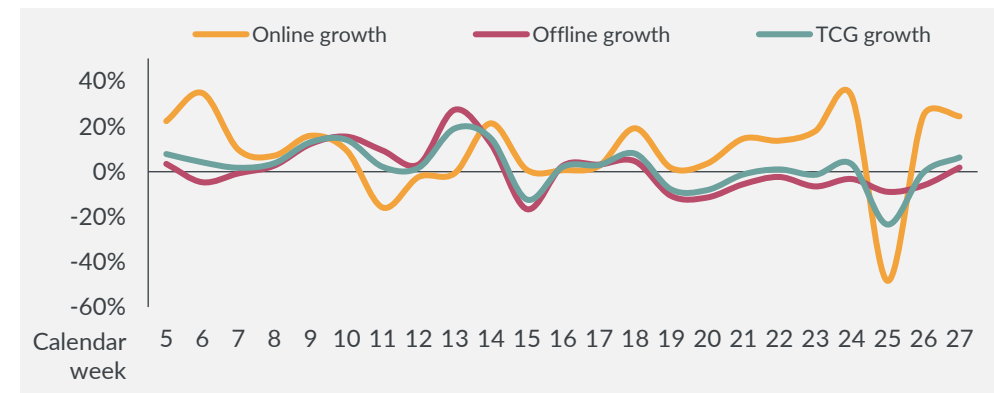
Brazil

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 27 (July 04 – July 10)

- Traditional retail recovered to +2% (versus -6% in week 26). Online sales witnessed a remarkable upswing of +24% in week 27. However, due to the small share of online vs traditional, the total TCG market accelerated by only +6%.
- Within IT/Office, media tablets took the lead at +20% and laser printers were in last place at -33%. Smartphones were up 15%.
- Air treatment delivered remarkable growth of 36%. MDA and all other SDA posted positive results. CE dropped by 10%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 27 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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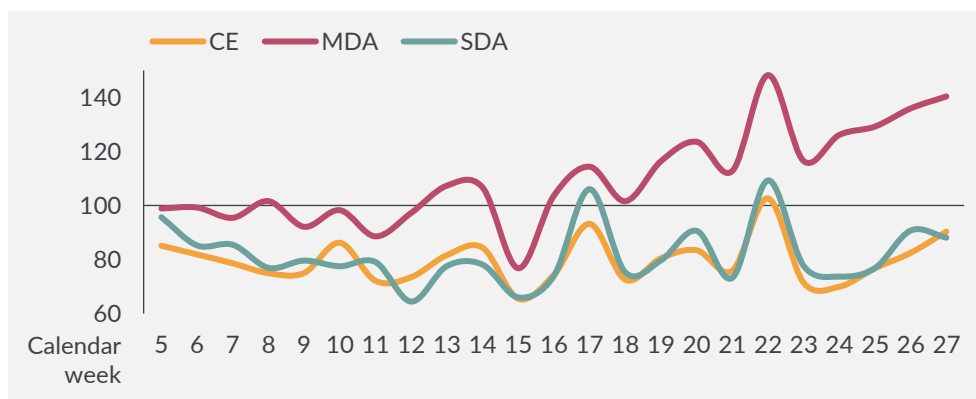
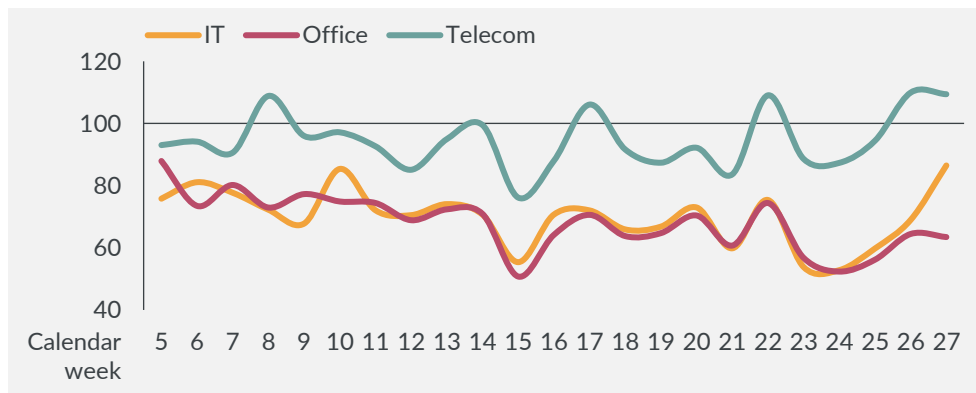
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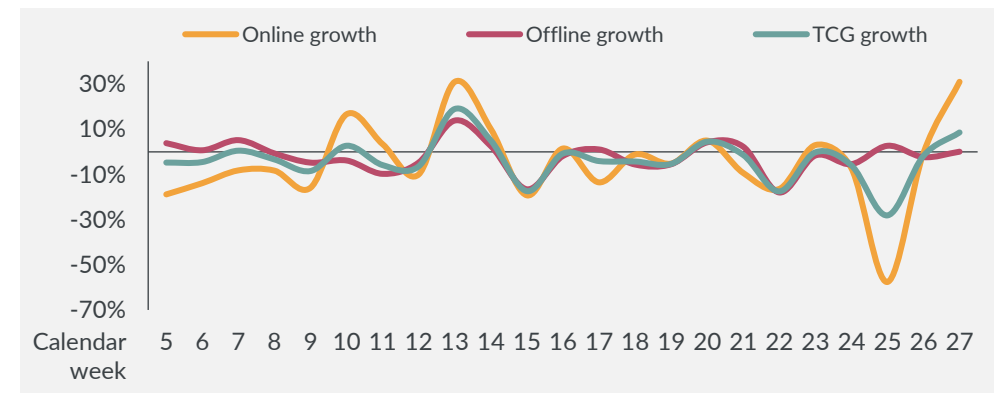
Brazil

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 27 (July 04 – July 10)

- The total TCG market recovered from -2% in week 26 to +8% in week 27, driven by online sales which showed remarkable growth of 31%. Traditional retail was flat.
- The best performing product group was mobile computing at +46%. Desk computing (+30%) and headsets (+26%) posted solid positive growth rates.
- Within MDA/SDA/CE products, soundbars delivered the highest growth rate at +28%. TV sales lagged at -3%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 27 2022 (no comparability with 2019); 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, 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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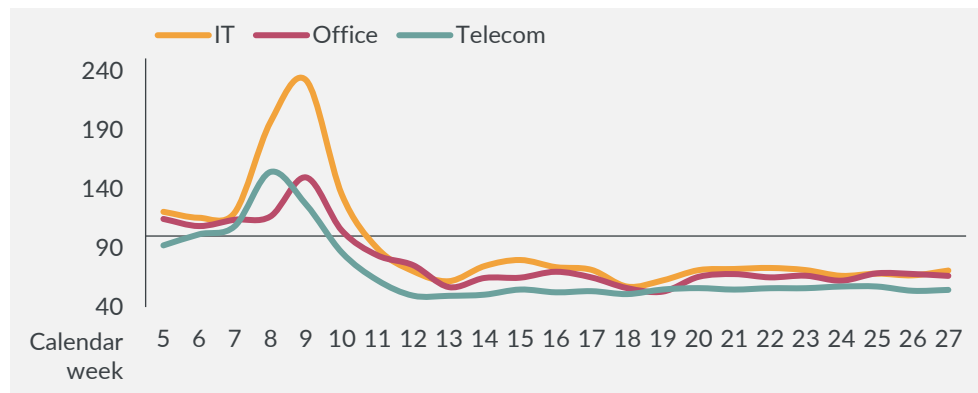
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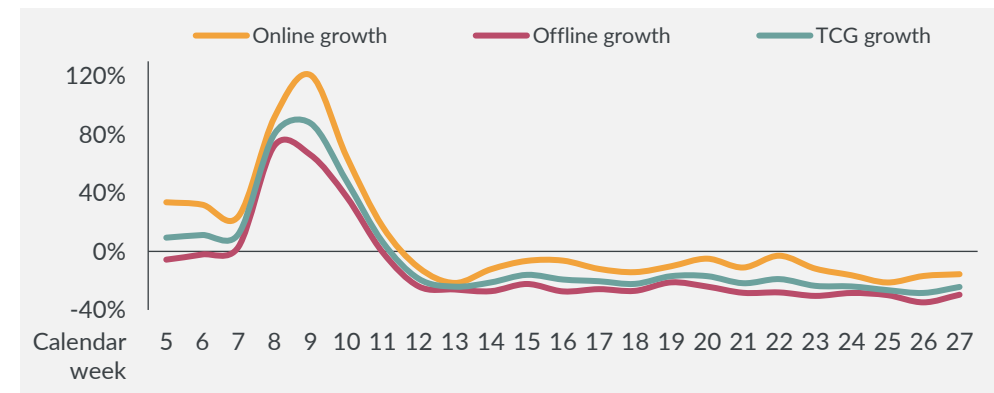
Brazil

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 27 (July 04 – July 10)

- The total TCG market continued its negative trend (-24%), driven by traditional retail at -30%. Online sales performed better but were still down by 15%.
- The most impacted product groups in week 27 were media tablets (-44%) and smartphones (-41%). Monitors were up 20%.
- Audio home systems posted an outstanding growth of +130% while the other CE product groups and MDAs posted negative trends. SDA products delivered a mixed picture.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 27 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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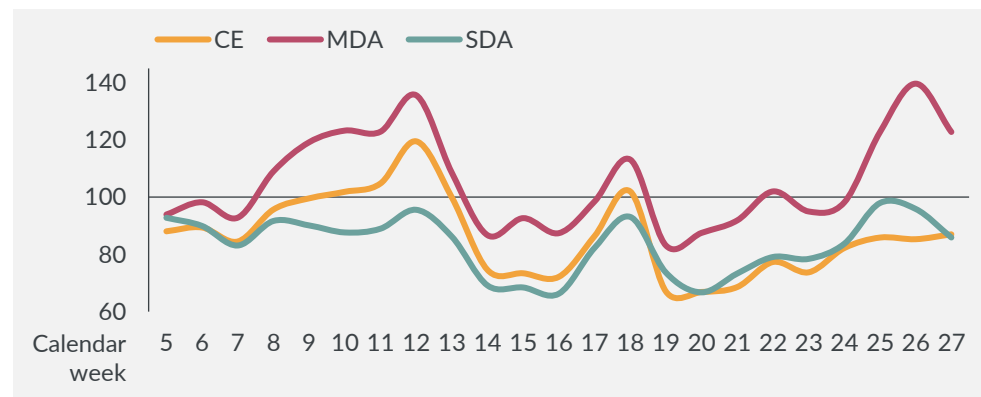
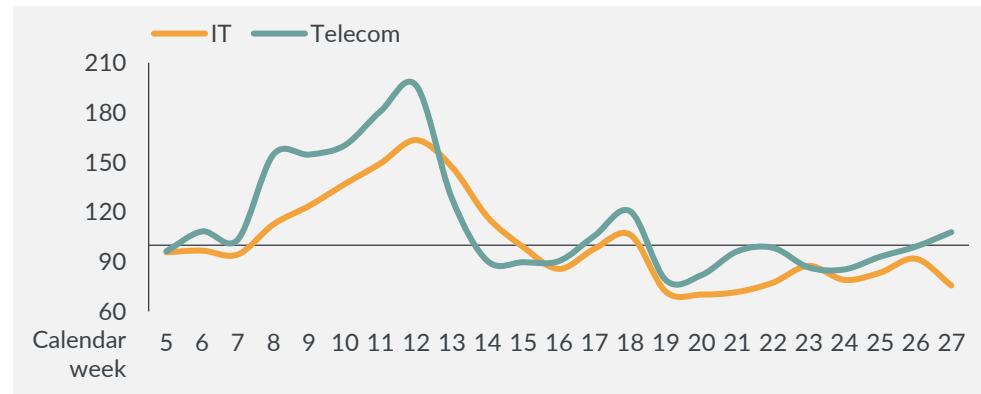
Russia

> Japan

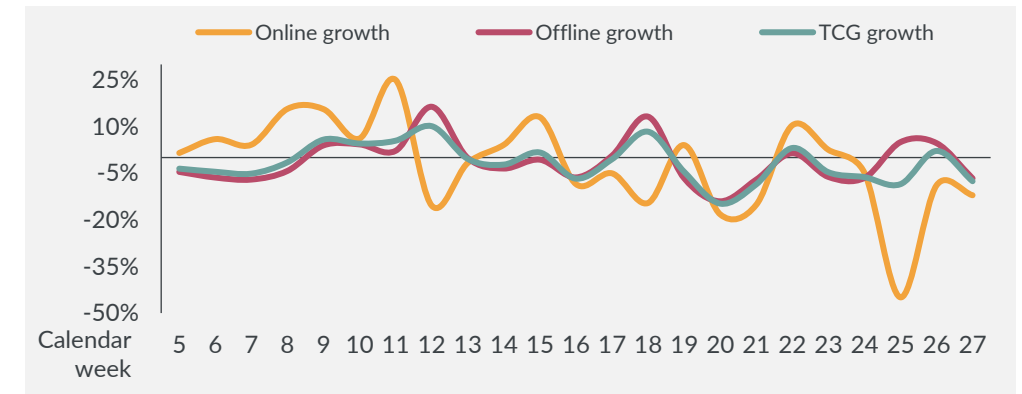
Brazil

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 27 (July 04 – July 10)

- Deceleration in traditional retail (-7%) dragged the total TCG market down by 8%. Online sales added to it by delivering -12%.
- Smartphones posted remarkable growth of 46% while headsets slumped at -14%. Mobile computing and media tablets were down at -3% and -29% respectively.
- MDA/SDA/CE products witnessed negative trends from -49% for air treatment to -2% for washing machines and dental care. Cooling and hot beverage makers were the only product groups to grow.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 27 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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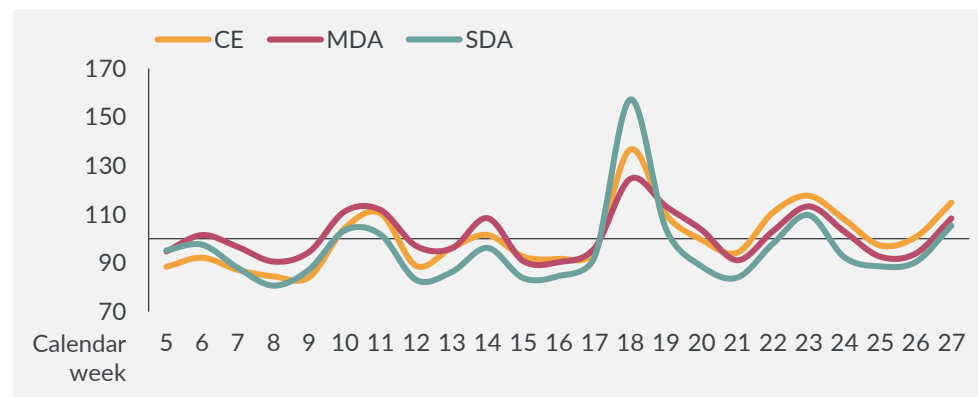
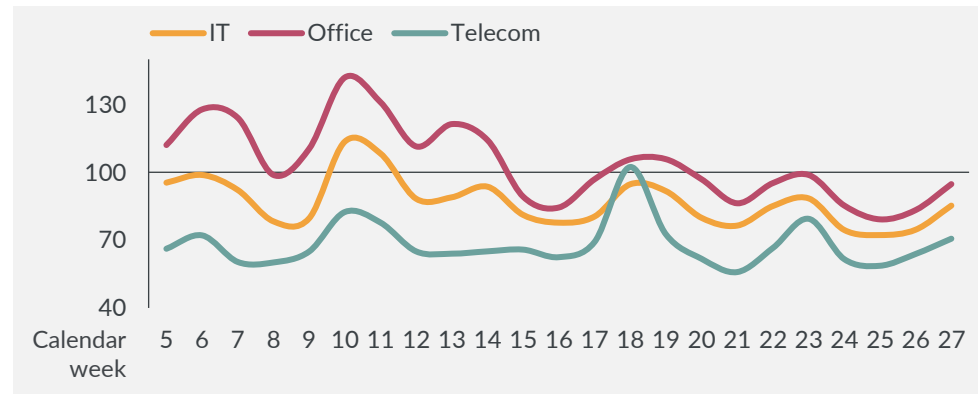
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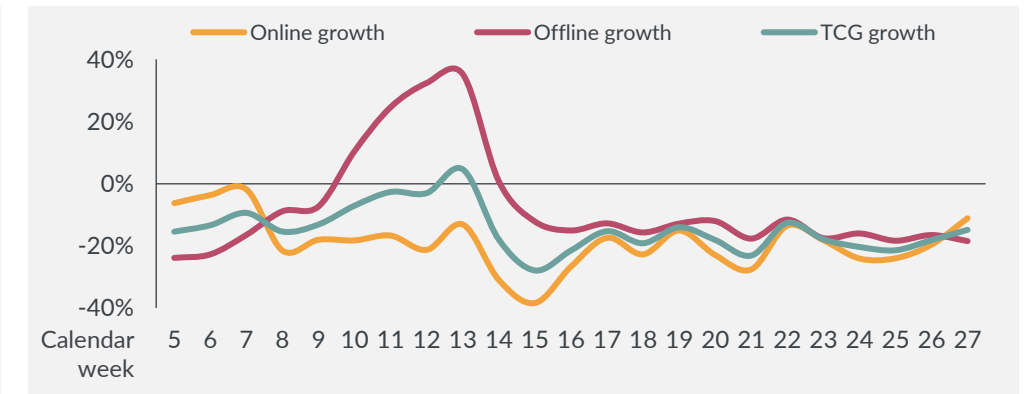
> Brazil

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 27 (July 04 – July 10)

- The major decreases for both traditional retail (-18%) and online sales (-11%) delivered a negative trend (-15%) for total TCG.
- Smartphones posted a negative rate (-28%) while IT/Office products saw a mixed picture, ranging from -5% for desk computing to -22% for laser printers.
- Most MDA/SDA/CE product groups delivered negative trends except for vacuum cleaners at +4% and TV sales at +5%. Cooling was flat.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 27 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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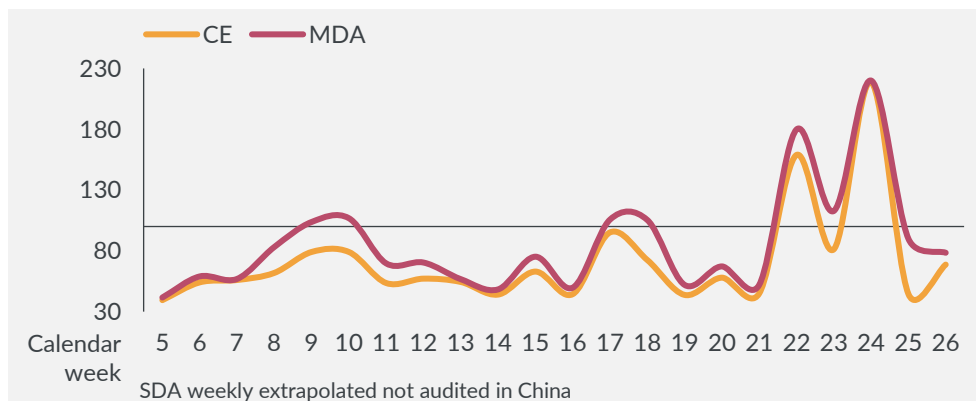
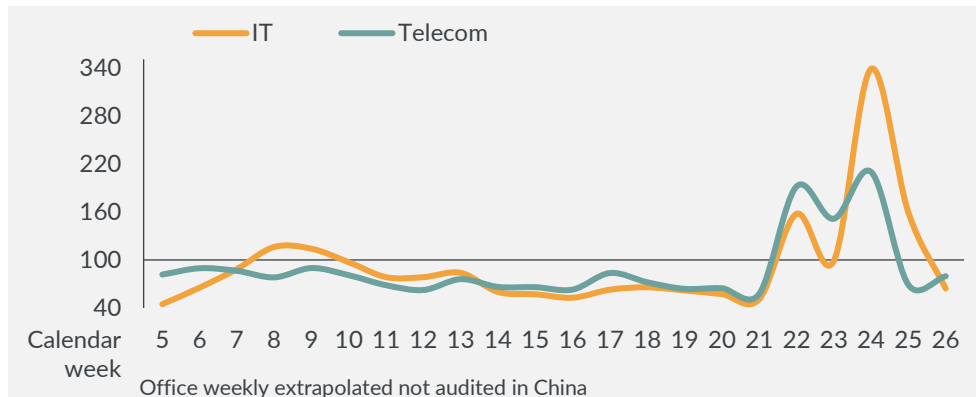
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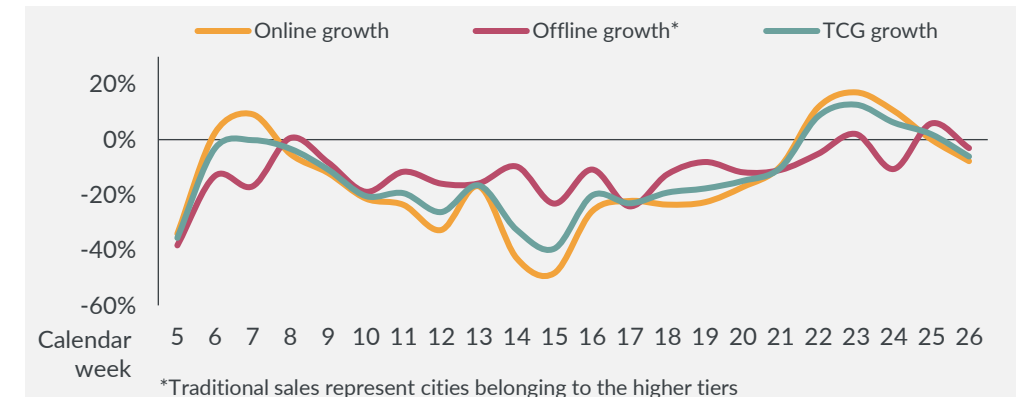
Brazil

> 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 27 (July 04 – July 10)

- Online sales (+6%) and traditional retail (-7%) delivered almost opposite performances to each other, which resulted in a slightly positive total TCG market (+1%).
- Mobile PCs posted an outstanding increase of 41%. Smartphones delivered a minus of 5%.
- Week 27 saw slight changes for cooling (+4%) and TV sales (-2%). Washing machines were flat.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 27 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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