



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 118

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gfknewron



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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:

More gaming purchasers seen in younger generation



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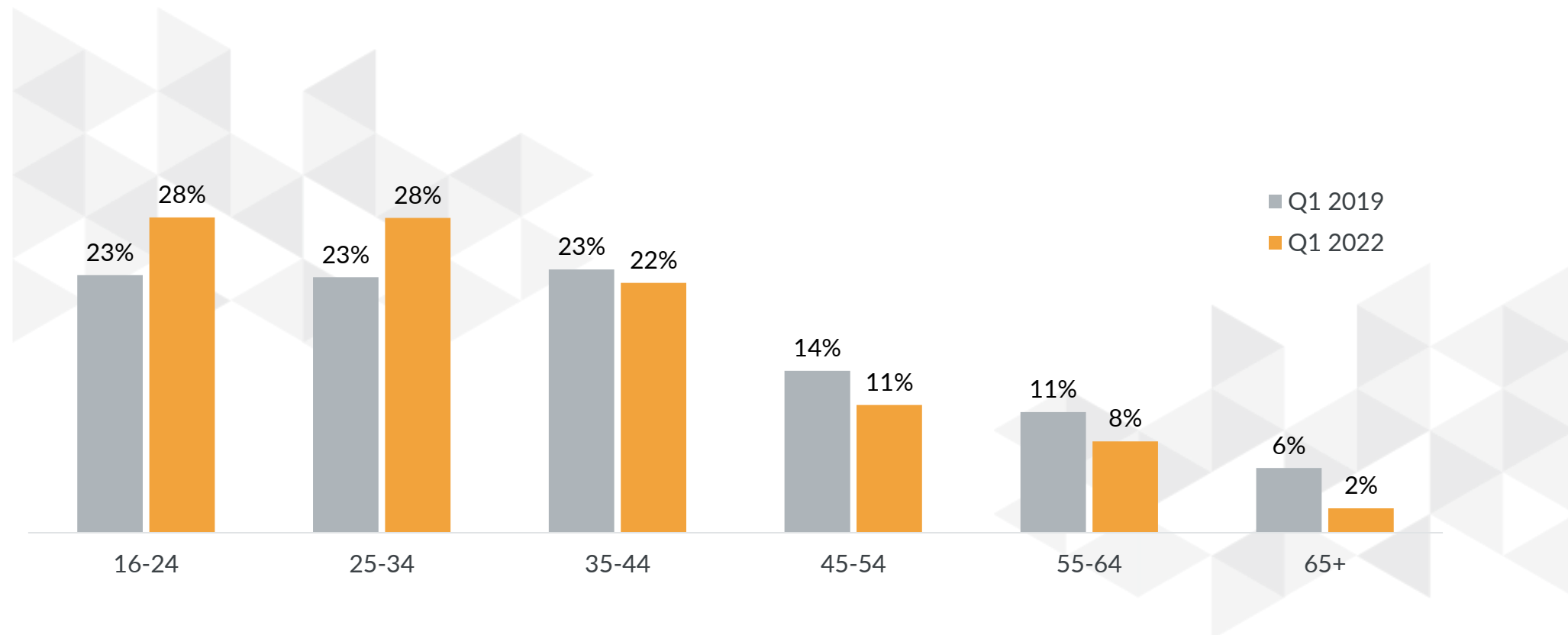
Russia

Japan

Brazil

China

gfknewron Consumer: Purchasers of Gaming Mobile PC, shares of age groups
14 countries*, Q1 2022



Source: gfknewron Consumer Intelligence: Product Purpose Gaming Mobile PC - 1614320 shoppers - 3946 interviews

*14 countries: Belgium, Brazil, Chile, France, Germany, Great Britain, Greece, Italy, Japan, Netherlands, Poland, South Korea, Spain, Switzerland

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



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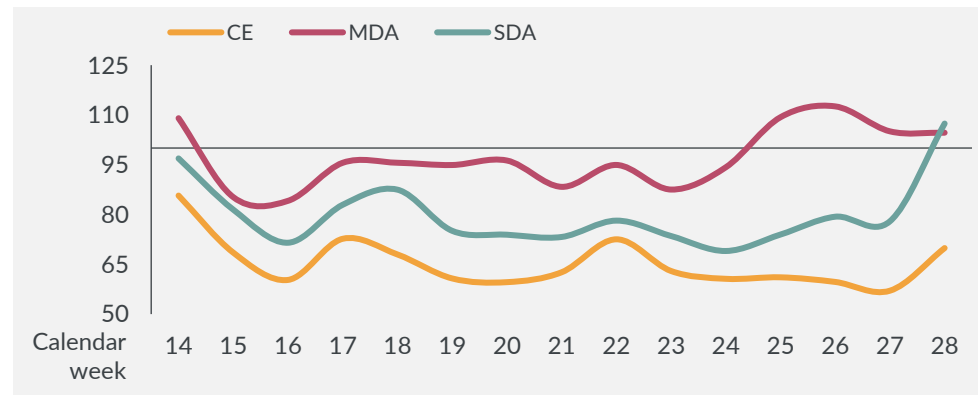
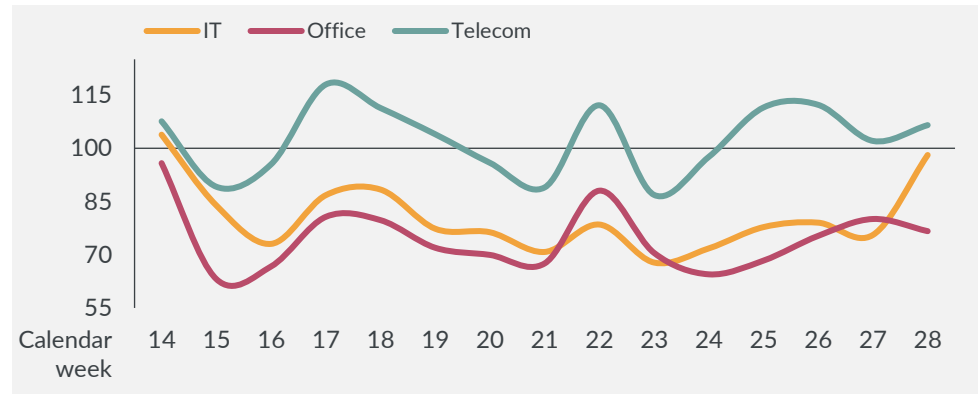
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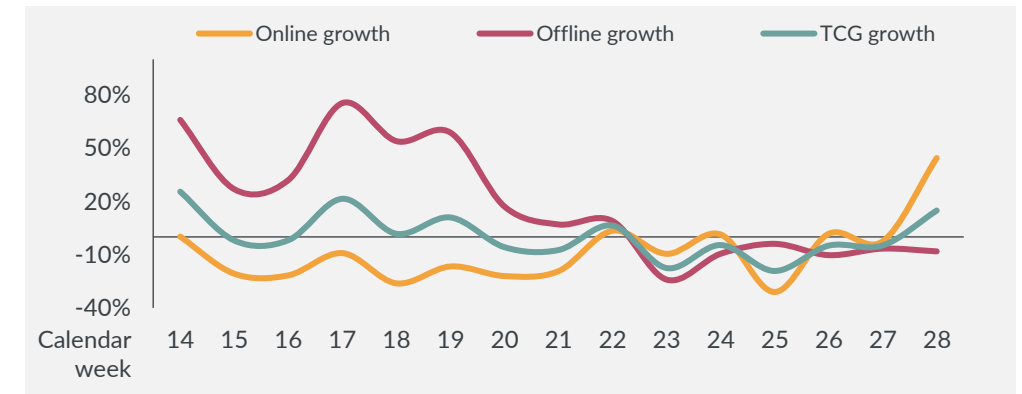
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 28 (July 11 – July 17)

- Amazon Prime Day delivered a remarkable growth of online sales (+44%) driving an upswing of the total TCG market of +15%. Traditional retail experienced a minus of 8%.
- Most IT product groups and smartphones accelerated in double digits, ranging from +16% for smartphones to +43% for media tablets. Printers slumped at -12%.
- There were substantial wins for dental care (+95%) and shavers (+55%). Washing machines and TVs lagged at -15% and -10%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 28 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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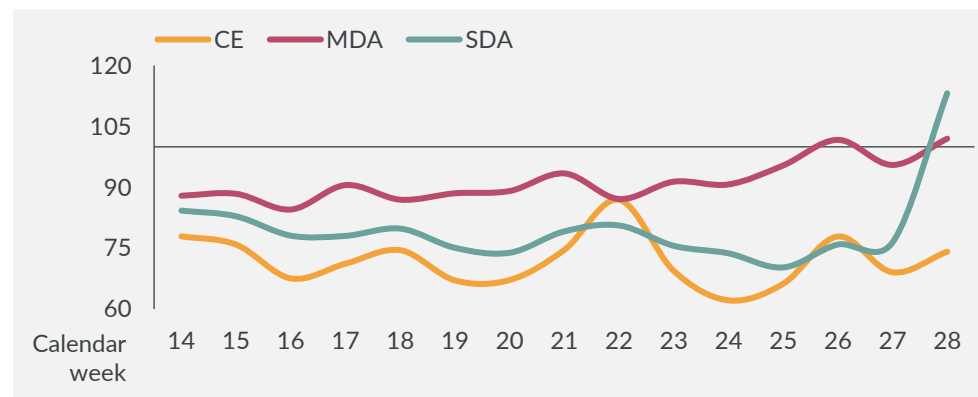
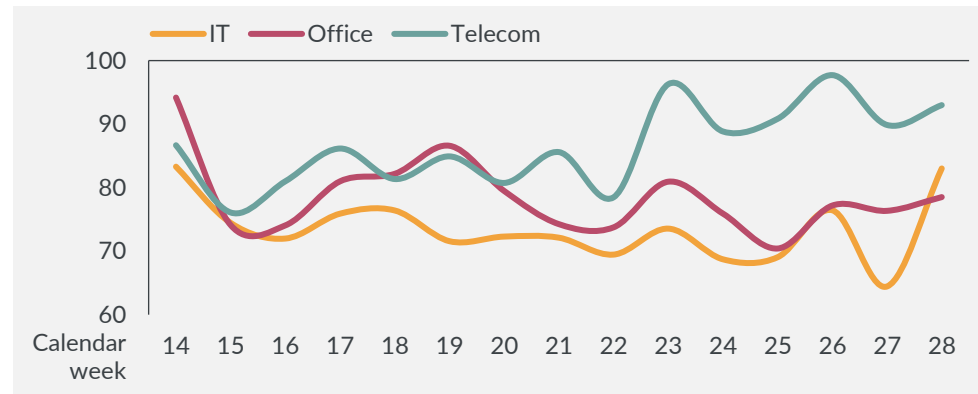
Russia

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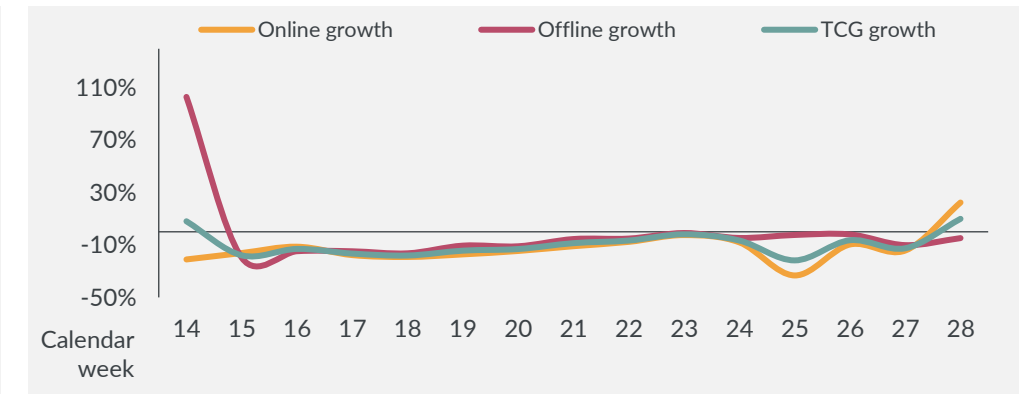
Brazil

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 28 (July 11 – July 17)

- Prime Day in the UK impacts: Online sales were up +22%, leading to an increase for the total TCG market of +10%. Traditional retail posted -5%.
- Mice and headsets were the best performing product groups within IT/Office and telecom at +80% and +78% respectively. Desk computing (-21%) and media tablets (-16%) brought up the rear.
- Among MDA/SDA/CE products, hot beverage makers (+111%) and dental care (+105%) witnessed triple-digit growth.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 28 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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Italy

Spain

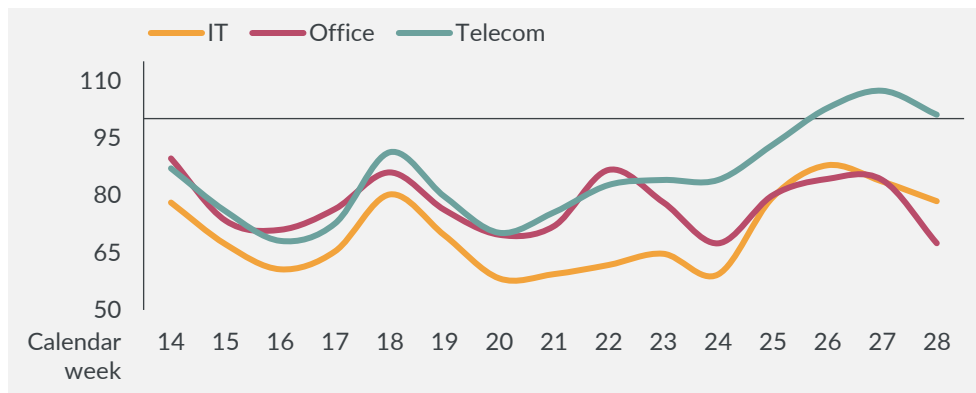
Russia

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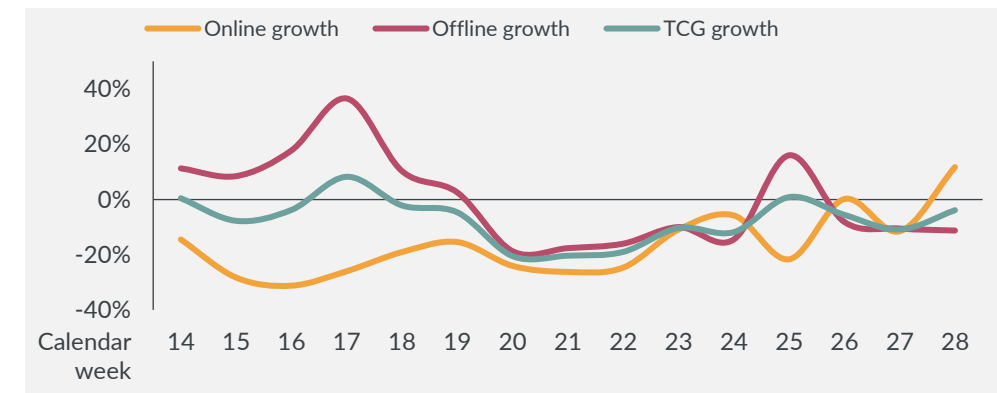
Brazil

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 28 (July 11 – July 17)

- Online sales delivered +12% (-12% the previous week) and traditional retail was down -11% (-11% the previous week), resulting in a downswing of the total TCG market of 4%.
- While office products posted -15%, IT and telecom delivered a mixed picture, ranging from -37% for desk computing to +16% for headsets.
- Air treatment saw extraordinary growth of 493%. CE products slumped at double-digit negative figures.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 28 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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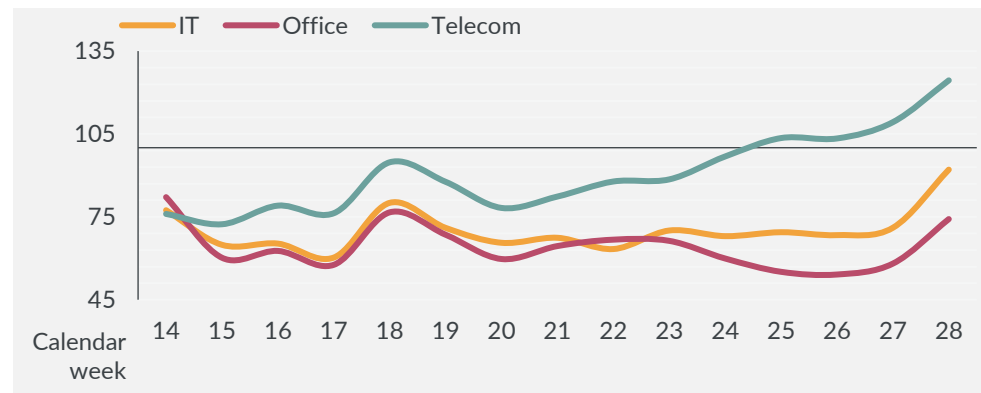
Russia

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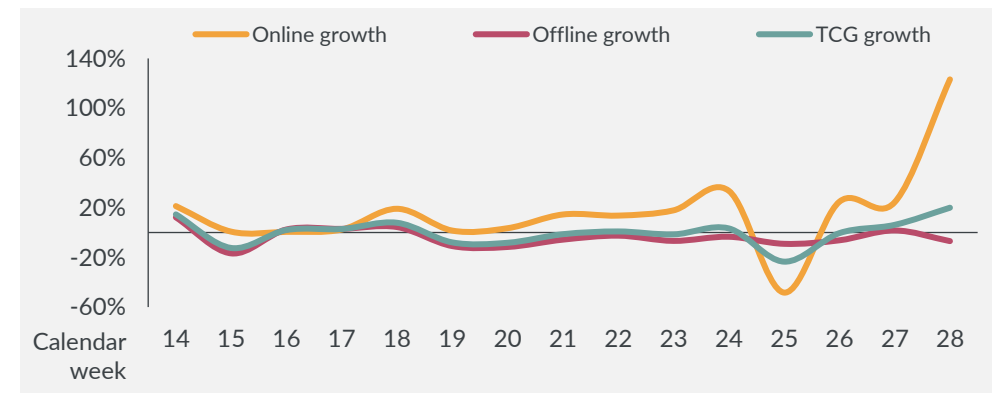
Brazil

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 28 (July 11 – July 17)

- Online sales posted +123% in Prime Day week, slightly less than Prime Day week 25 in 2021 (+136%). The total TCG market gained +20%. Traditional retail declined by 7%.
- IT/Office products ranged from -25% for laser printers to +23% for media tablets. Smartphones accelerated at +27%.
- Air treatment (+89%) and shavers (+86%) saw exceptional growth but were topped by dental care at +166%. TV sales were flat. Cooling (+5%) and washing machines (+3%) posted slight increases.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 28 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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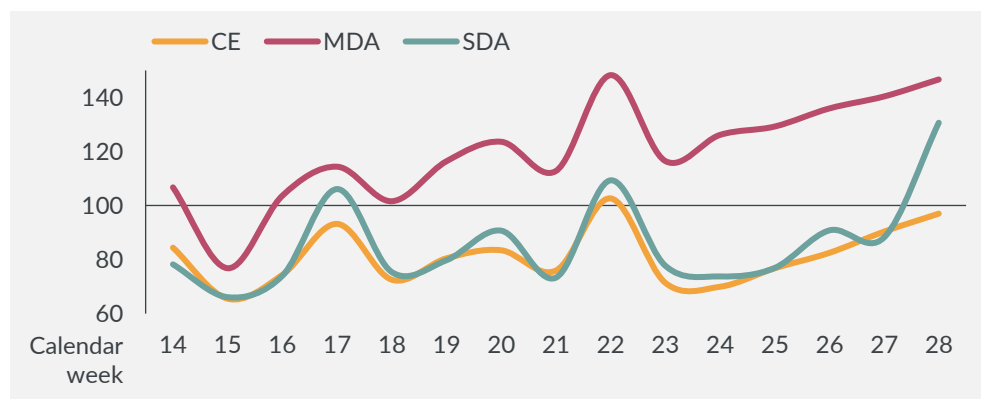
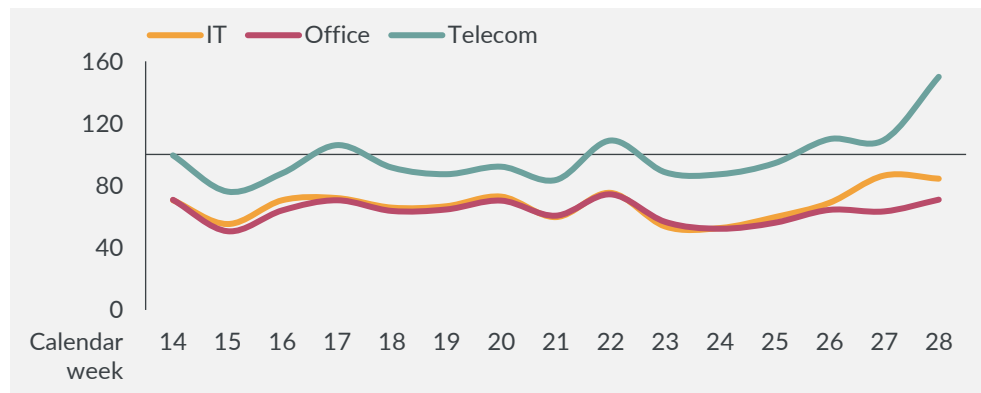
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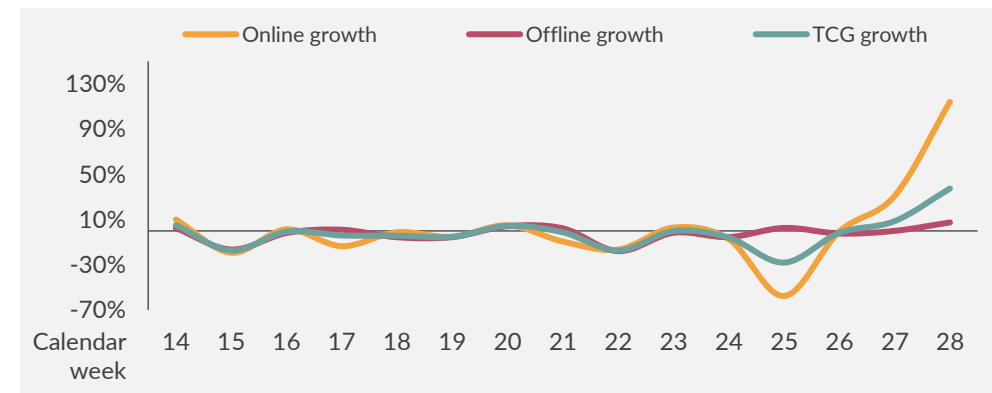
Brazil

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 28 (July 11 – July 17)

- A Prime Day-driven uplift of online sales (+114%) pushed the total TCG market to +37%. Traditional retail witnessed +8%.
- Most IT/Office and telecom products grew in double-digits, ranging from +62% for headsets to +12% for inkjet printers. Media tablets lagged at +6%.
- All MDA/SDA/CE products posted double-digit positive trends, with soundbars in the lead at +94% and washing machines bringing up the rear at +10%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 28 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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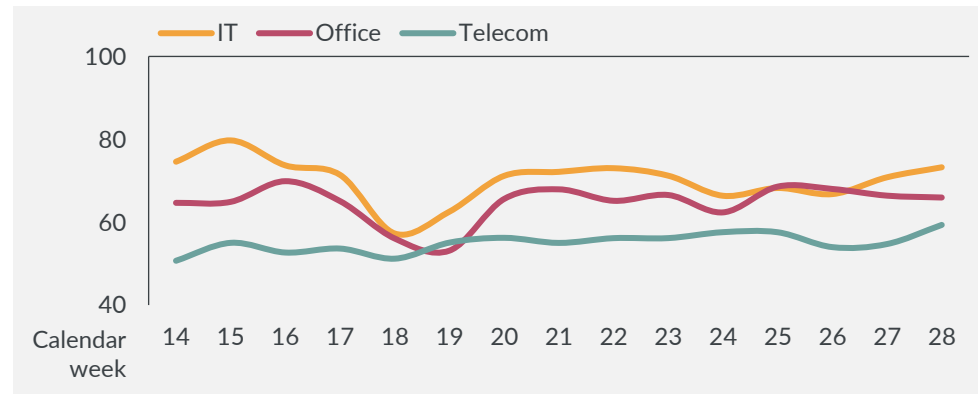
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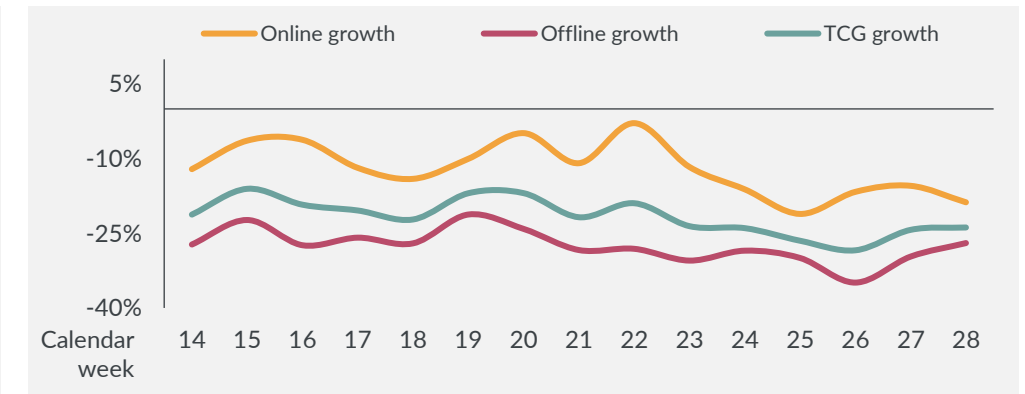
Brazil

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 28 (July 11 – July 17)

- The total TCG market continued its negative trend (-24%), driven by traditional retail at -27%. Online sales performed better but were still down by 19%.
- The most impacted product groups were media tablets and smartphones at -38% and -42%. Monitors were up 35%.
- Audio home systems posted an outstanding growth of +113% while MDAs were down 10%. SDA products delivered a mixed picture with dental care at +12% and air treatment at -44%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 28 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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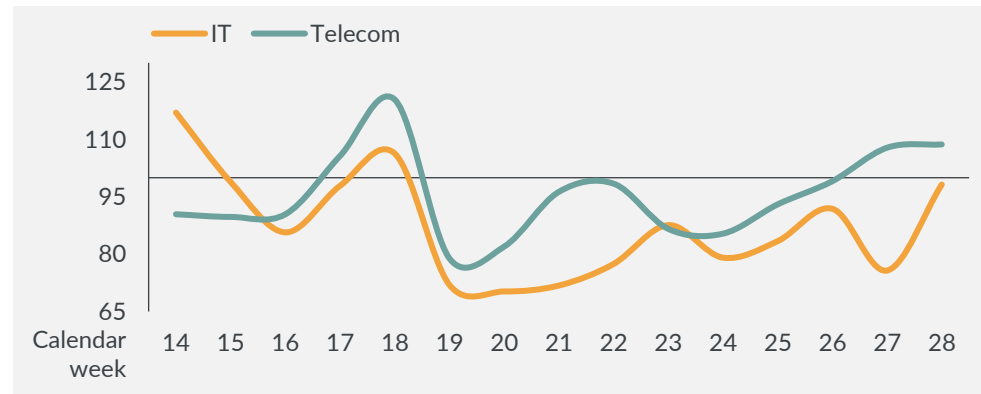
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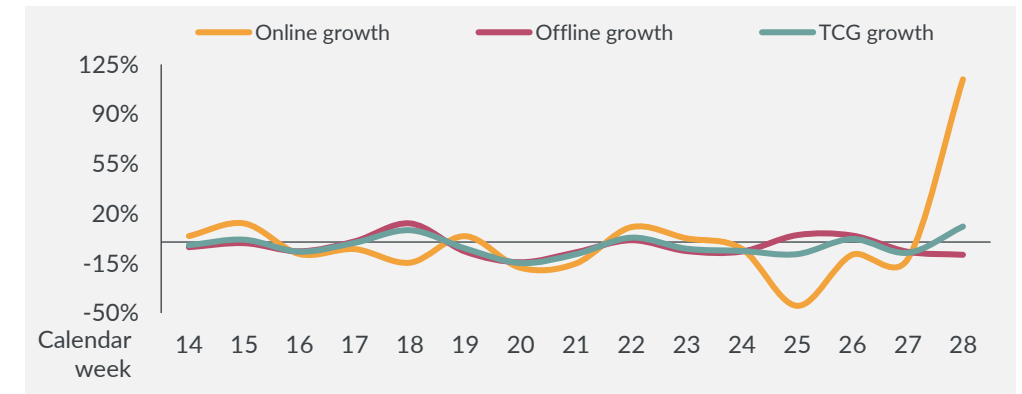
Brazil

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 28 (July 11 – July 17)

- A strong acceleration of online sales (+114%) led to an uplift of the total TCG market of +11%. Traditional retail lagged at -9%.
- Headsets (+90%) took the lead among IT and telecom products. Media tablets slumped at -25%. Smartphones delivered +28%.
- Dental care and hot beverage makers (+140% each) were the best performing product groups. TV (-17%), air treatment (-9%), audio home systems (-4%), and cooling (-3%) posted negative trends.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 28 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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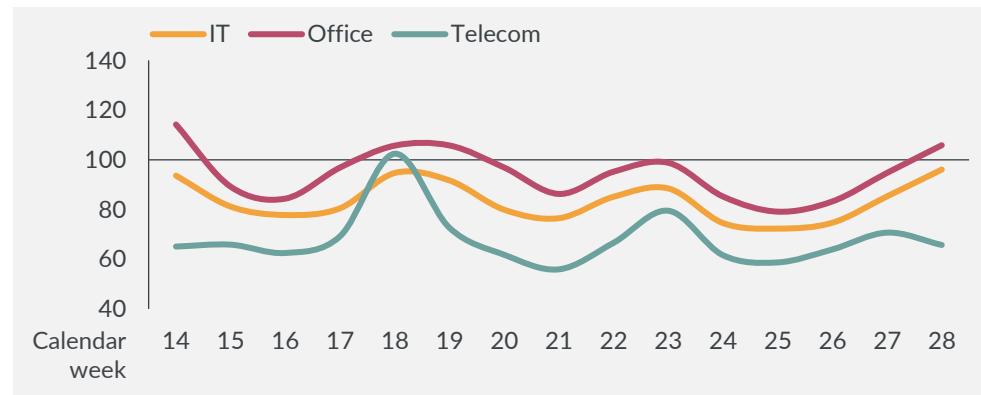
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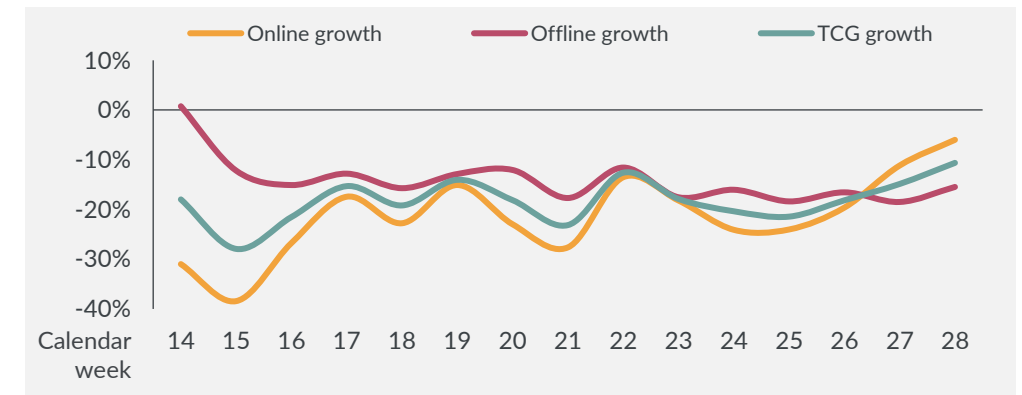
> Brazil

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 28 (July 11 – July 17)

- The decreases for both traditional retail (-15%) and online sales (-6%) slowed compared to past weeks but still delivered a negative trend (-11%) for total TCG.
- Smartphones posted a negative rate (-29%) . Most IT/Office products saw double-digit positive numbers, with just desk computing lagging at -7%.
- Audio home systems delivered -11% while MDAs were only slightly negative. SDAs grew, led by vacuum cleaners at +31%.

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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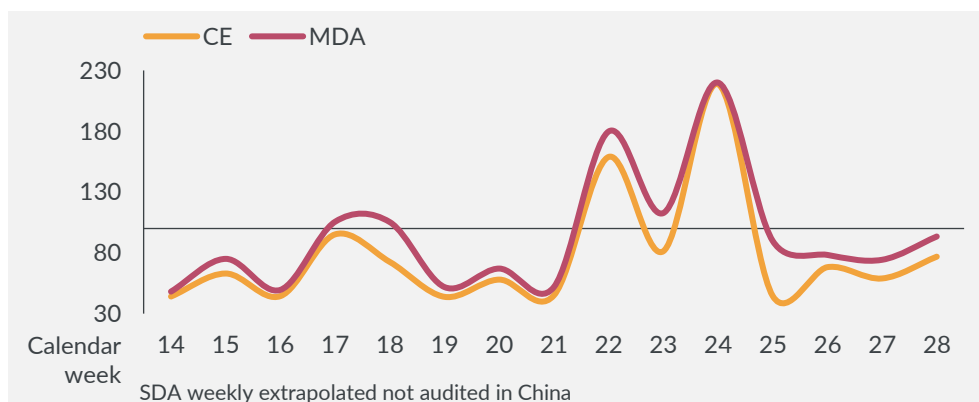
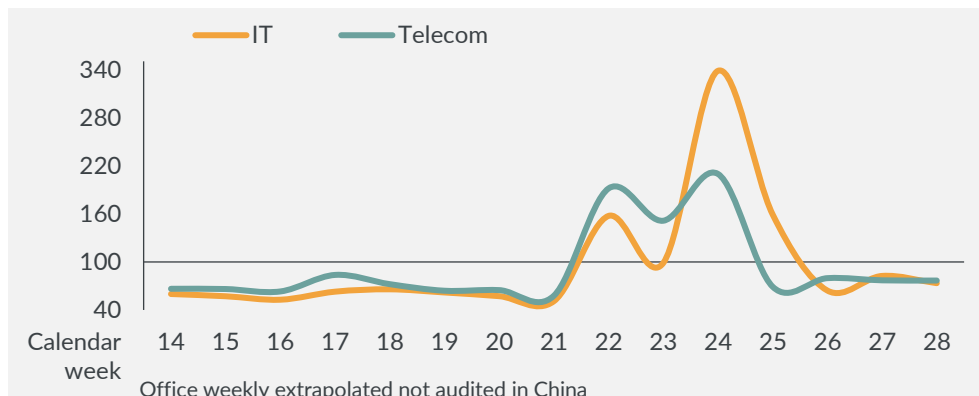
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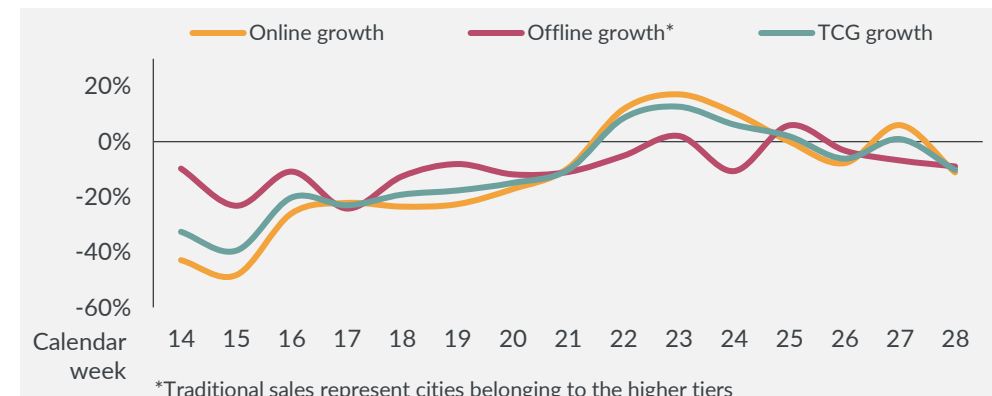
Brazil

> 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 28 (July 11 – July 17)

- Both distribution channels fell again, with close rates of -11% for online sales and -9% for traditional retail, leading to a downswing of the total TCG market of 10%.
- Mobile PCs posted a decrease of 18%. Smartphones delivered a minus of 9%.
- Week 28 saw a double-digit drop for washing machines (-20%) while TV sales (-6%) and cooling (-8%) decelerated in single digits.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 28 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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