



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 119

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> About gfknewron

Fact of the week

Germany

Great Britain

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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:

The pandemic has boosted the headphone business



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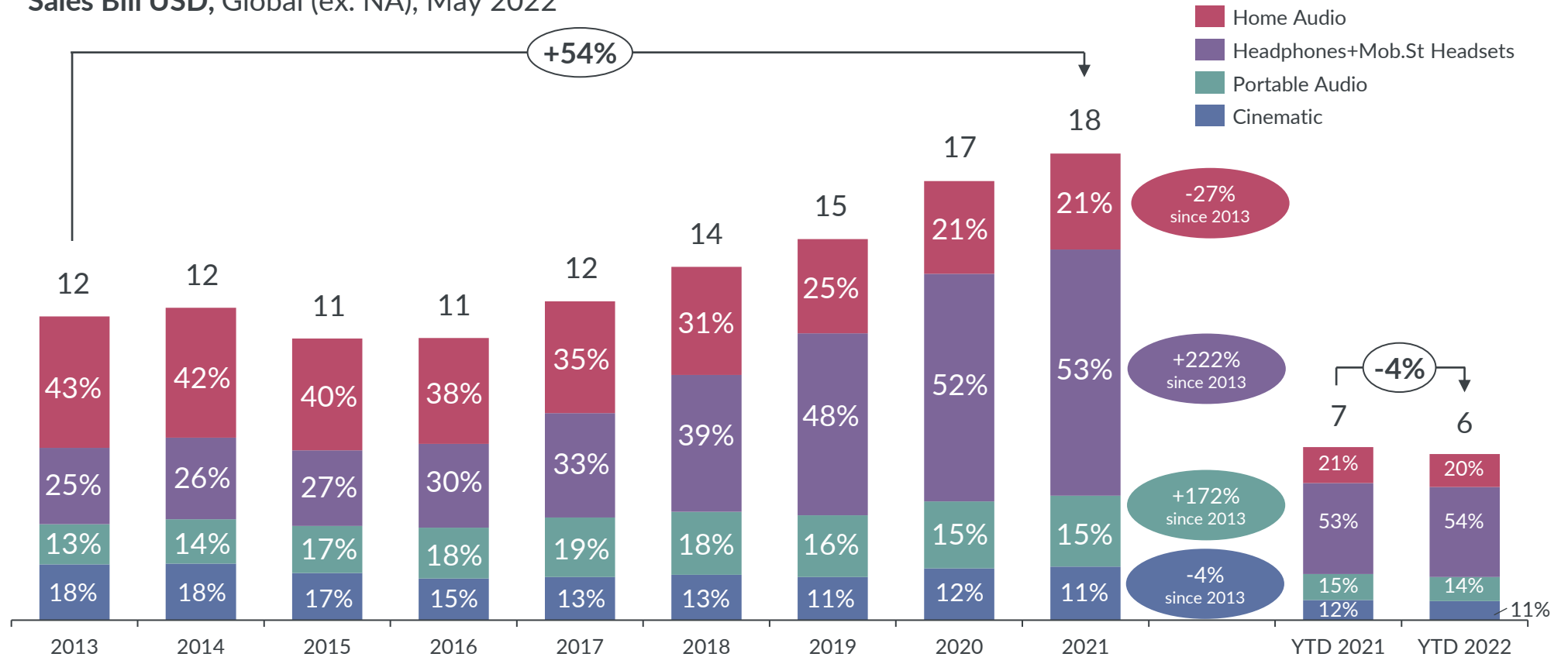
Russia

Japan

Brazil

China

Sales Bill USD, Global (ex. NA), May 2022



Source: Market Intelligence: Sales Tracking - Global (excl. North America); Home Audio: AHS excl. HT, Trad Loudspeaker, Radio Devices; Portable Audio: Mini/Bluetooth Speaker, Cinematic: Home Theater, Soundbase/bar

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



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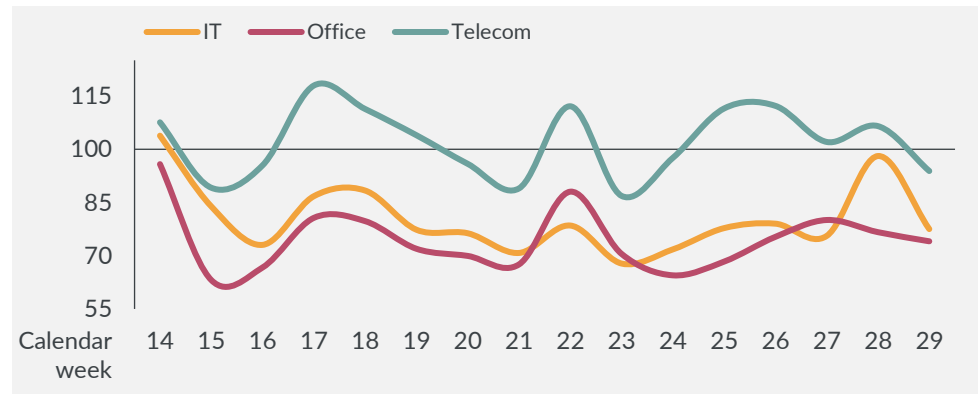
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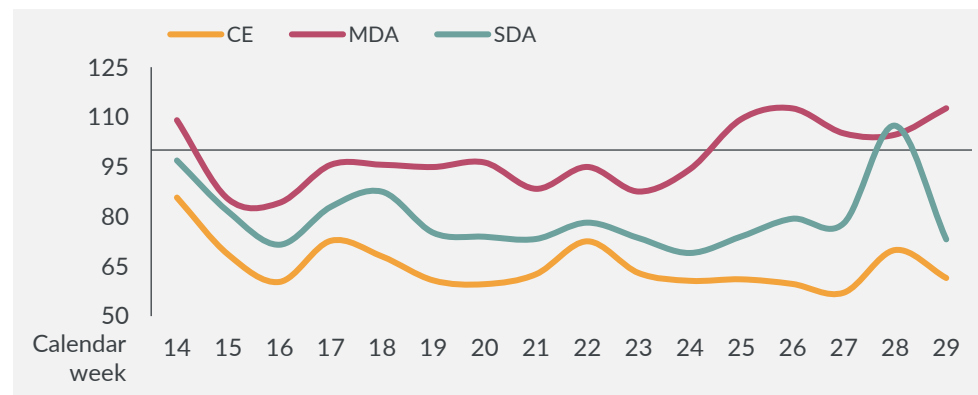
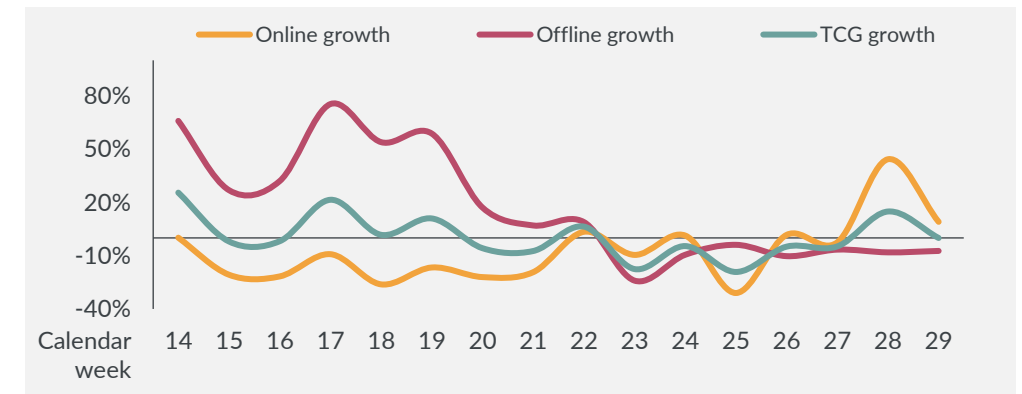
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 29 (July 18 – July 24)

- Post-Prime Day week delivered +9% for online sales. The minus of 7% for traditional retail balanced the online results, resulting in a flat total TCG market.
- Monitors (+22%) and media tablets (+28%) were the best performing product groups. Smartphones were up 5%. Printers lagged at -6%.
- There were double-digit losses for CE products (-17%), washing machines (-14%), hot beverage makers (-13%), and shavers (-11%).

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 29 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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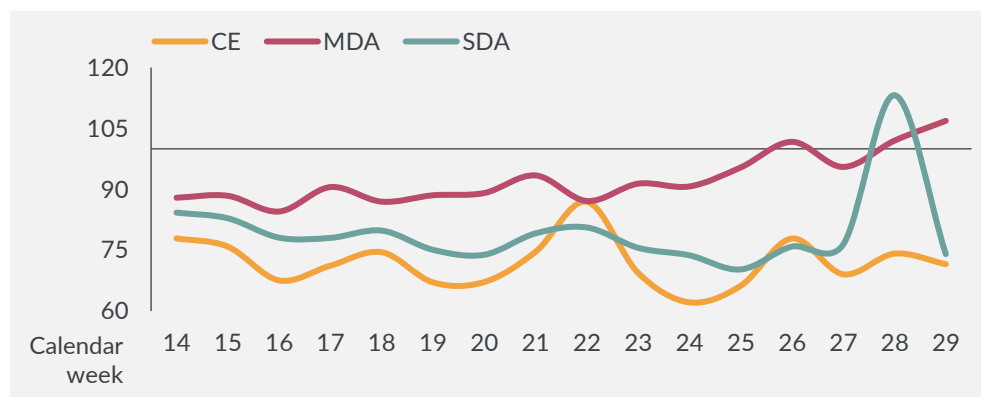
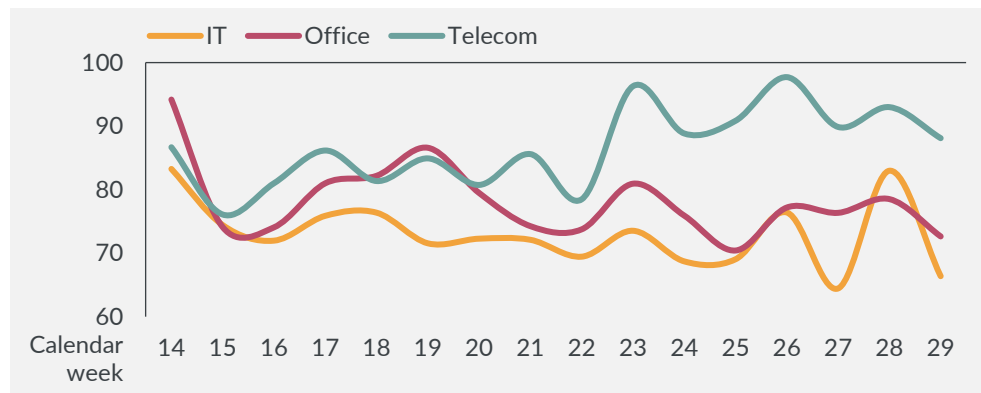
Russia

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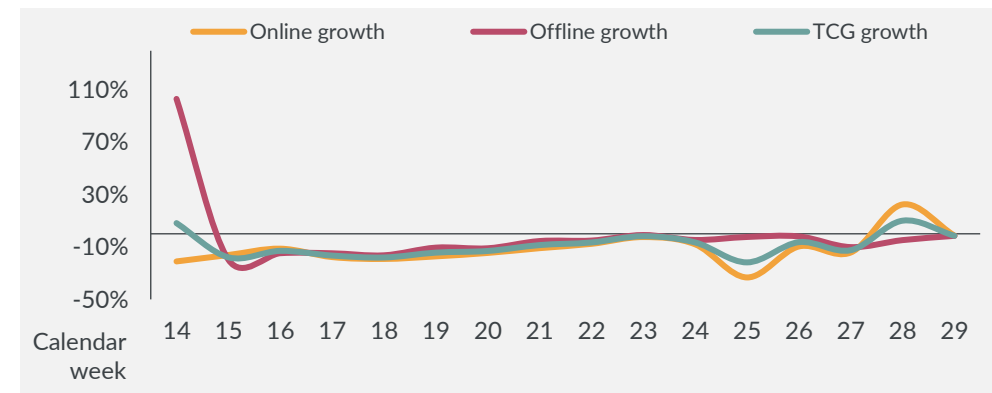
Brazil

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 29 (July 18 – July 24)

- Moderate deceleration of online sales (-1%) and traditional retail (-2%) led to a slight overall decline for the total TCG market (-1%).
- The product groups suffering the most in week 29 were media tablets at -29%, followed by laser printers at -23%. Smartphones posted +4% and headsets +13%.
- Within MDA/SDA/CE products, dental care was the ray of light at +8%. MDA lost 10%, audio home systems 12%, and food preparation was down 13%. TV sales were flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 29 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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Italy

Spain

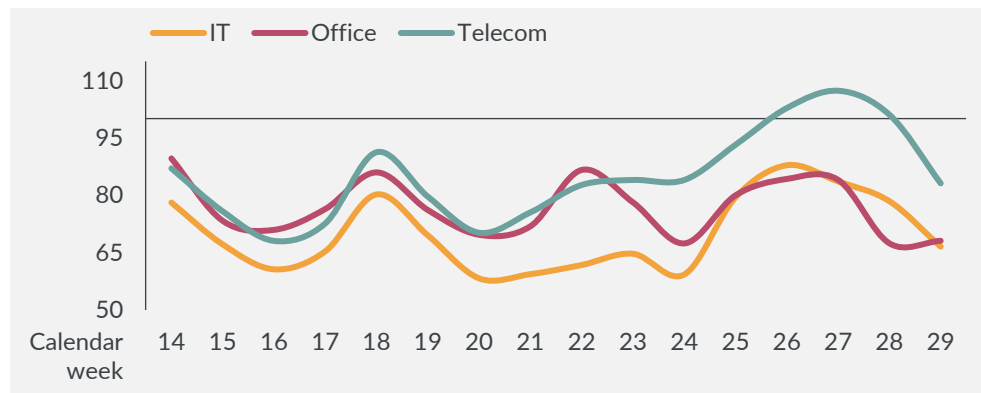
Russia

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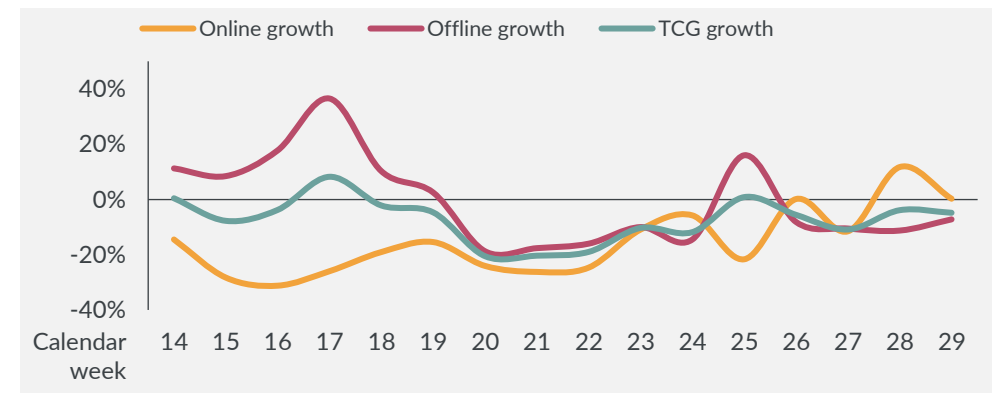
Brazil

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 29 (July 18 – July 24)

- The total TCG market decelerated by 5% driven by traditional retail (-7%). Online sales were flat.
- Most IT/Office and telecom products delivered negative trends, led by desk computing at -22%. Monitors posted +4% and headsets +6%. Smartphones slumped at -8%.
- Air treatment saw remarkable growth of +89%. CE and most other MDA and SDA products experienced a downswing, with audio home systems out in front at -25%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 29 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 Italy



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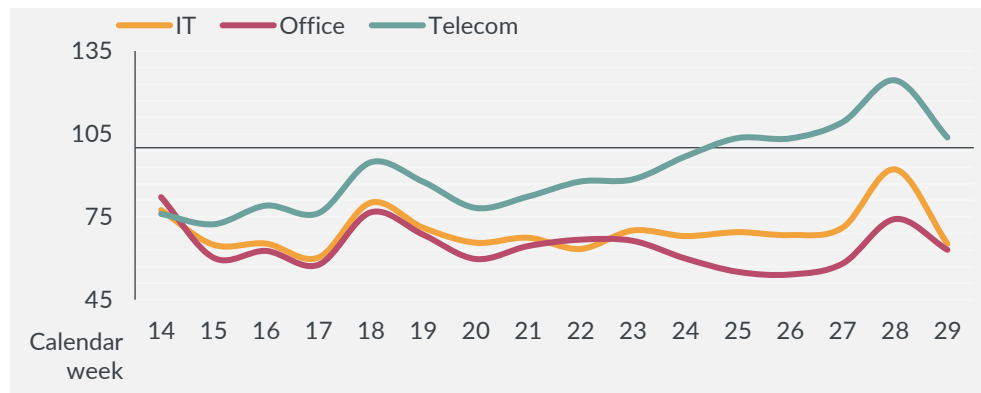
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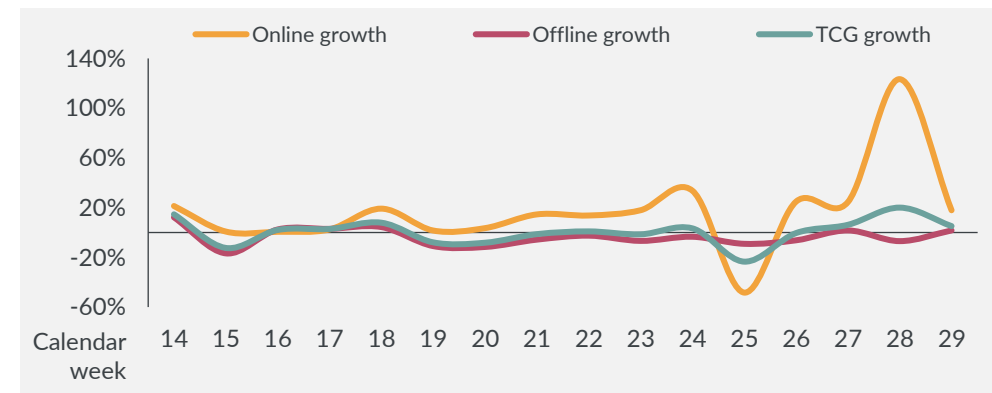
Brazil

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 29 (July 18 – July 24)

- The post-Prime Day week was still successful for online sales (+18%). Weak traditional retail (+2%) dragged the total TCG market to just +5%.
- IT/Office products ranged from -17% for laser printers to +5% for media tablets. Smartphones accelerated at +7%.
- Air treatment delivered exceptional growth of 256%. Vacuum cleaners (+27%), cooling (+19%), hot beverage makers (+16%), and shavers (+12%) posted solid double-digit results.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 29 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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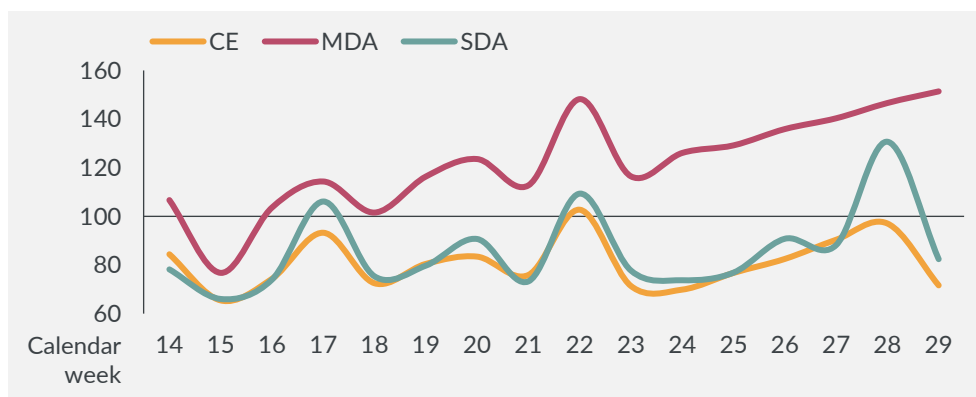
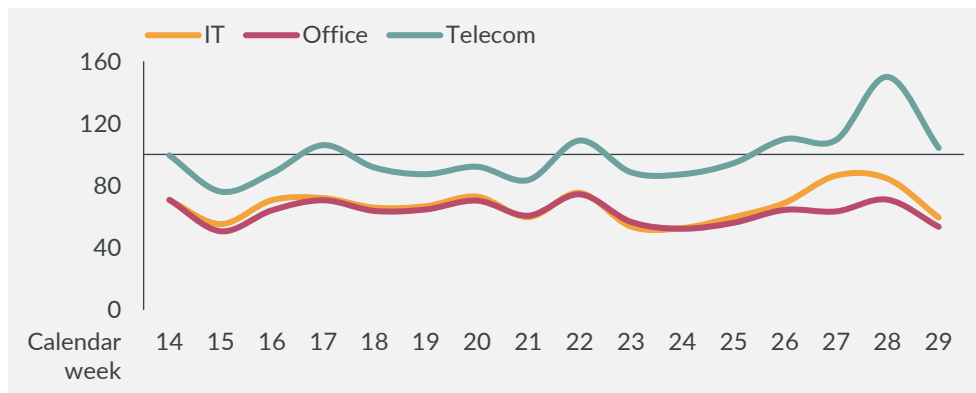
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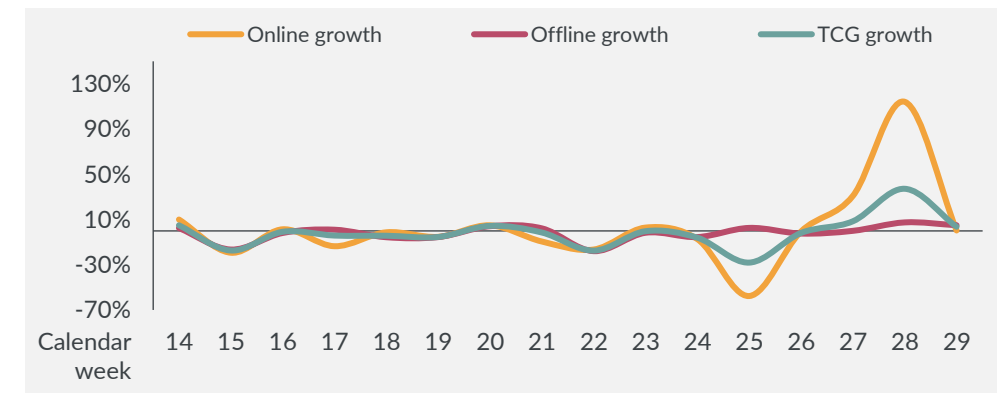
Brazil

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 29 (July 18 – July 24)

- Moderate acceleration of traditional retail (+5%) led to a slight overall upswing for the total TCG market (+4%). Online sales were flat.
- In week 29, desk computing was the weakest product group at -20%. All other IT/Office products were negative, too. Headsets experienced a plus of 7% and smartphones +5%.
- Cooling and vacuum cleaners posted double-digit growth of 27% and 17% respectively. TV sales slumped at -10%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 29 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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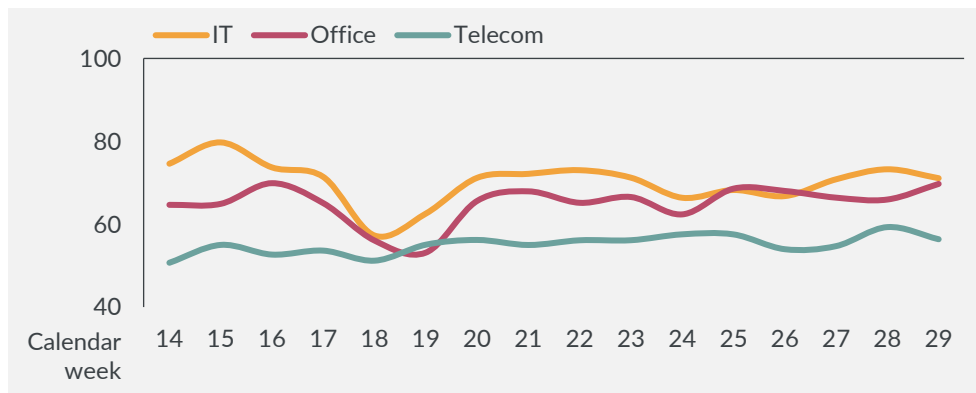
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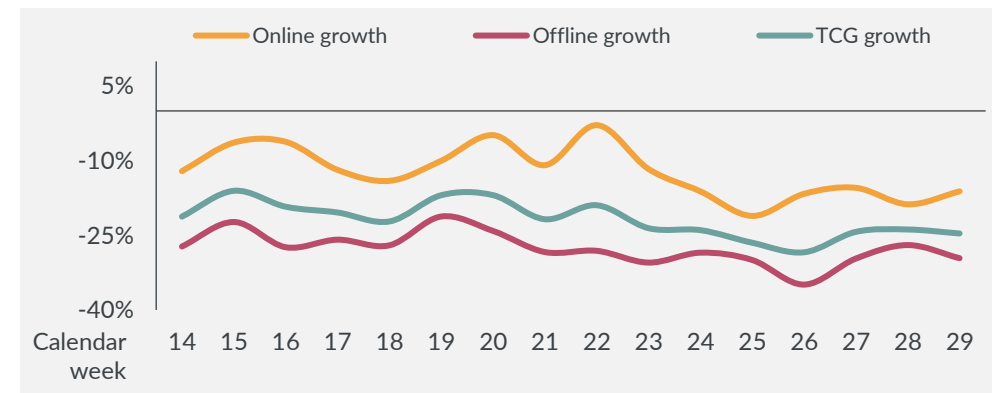
Brazil

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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 29 (July 18 – July 24)

- The total TCG market continued its negative trend (-25%), driven by traditional retail at -30%. Online sales performed better but were still down by 16%.
- The most impacted product groups were media tablets and smartphones at -39% and -43%. Monitors were up 22%.
- Audio home systems posted an outstanding growth of +98% while MDAs were down 12%. SDA products delivered a mixed picture with food preparation at +20% and air treatment at -26%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 29 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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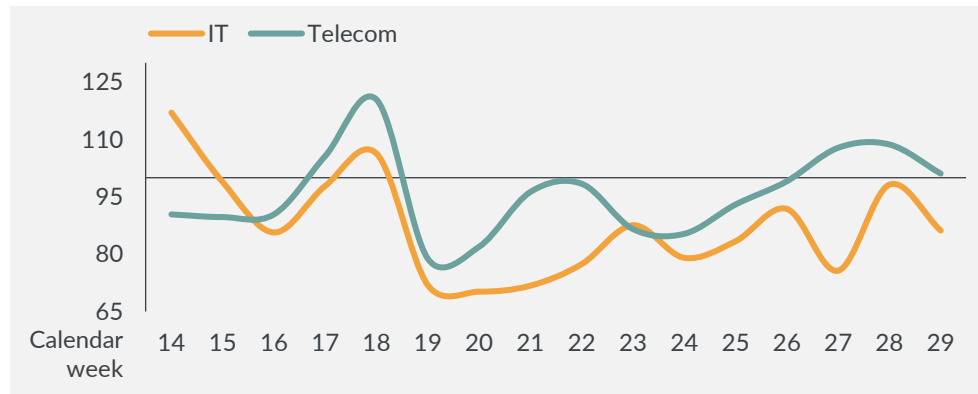
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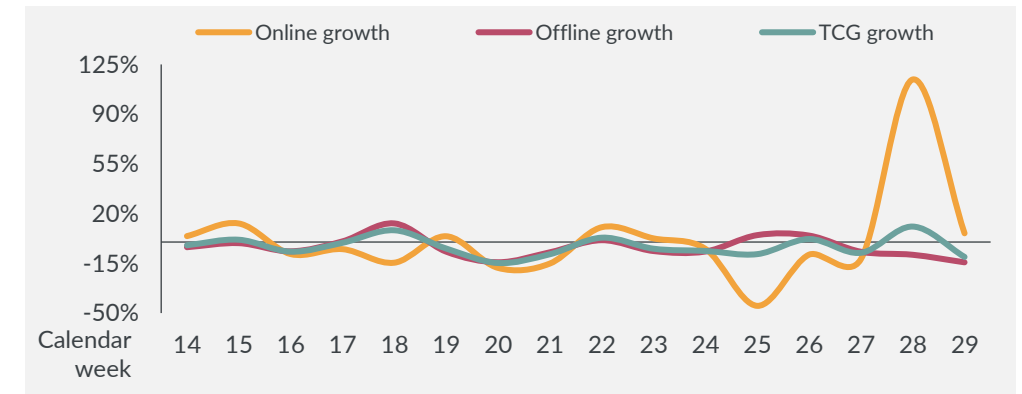
Brazil

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 29 (July 18 – July 24)

- Deceleration in traditional retail (-14%) pulled the total TCG market down by 11%. Online sales delivered +6%.
- Headsets posted growth of 32% while smartphones were stable at +0.4%. While media tablets fell strongly (-43%), mobile computing posted slight losses at -1%.
- CE products experienced a double-digit downswing of 28%. MDA and SDA products delivered a mixed picture, ranging from -33% for air treatment to an extraordinary +167% for hot beverage makers.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 29 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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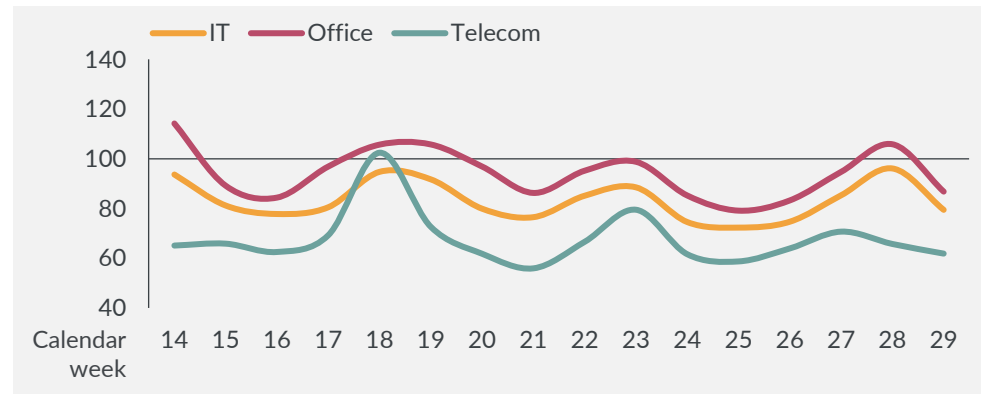
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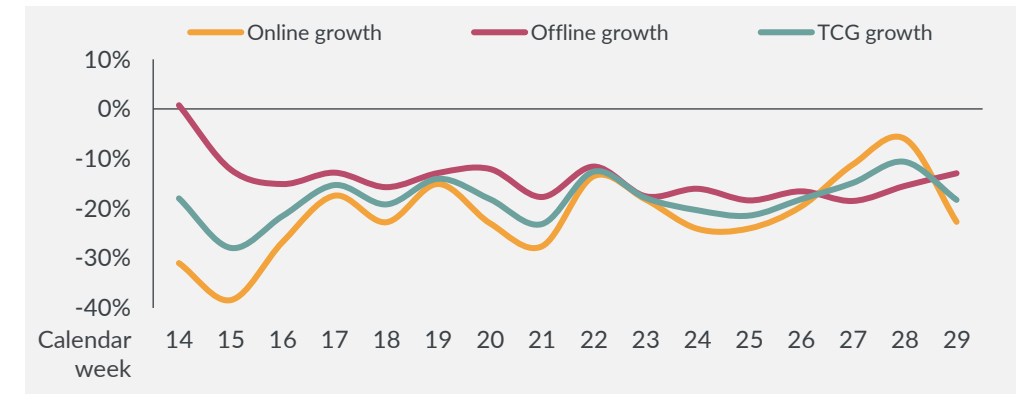
> Brazil

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 29 (July 18 – July 24)

- The decreases for both traditional retail (-13%) and online sales (-23%) accelerated compared to past weeks and delivered a strong negative trend (-18%) for total TCG.
- Smartphones posted a negative rate (-35%). Trends for IT/Office products ranged from -12% for desk computing to +24% for media tablets.
- There was a mixed picture for MDA/SDA/CE products, ranging from between +12% for TV sales and -14% for shavers.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 29 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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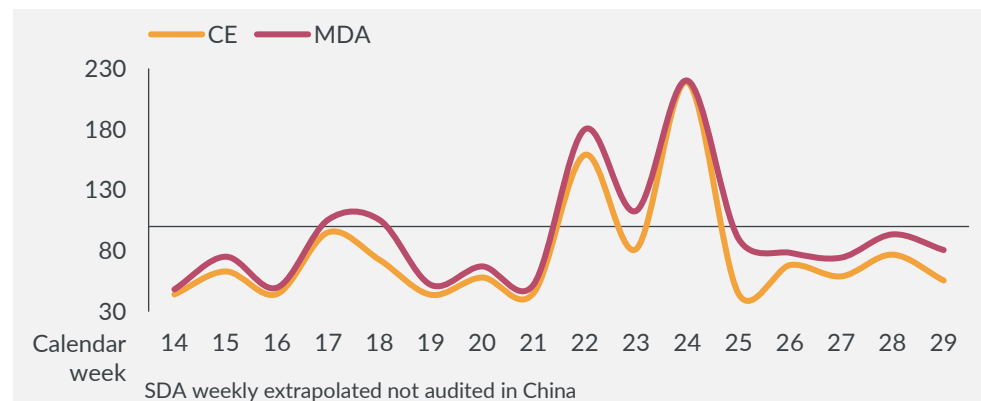
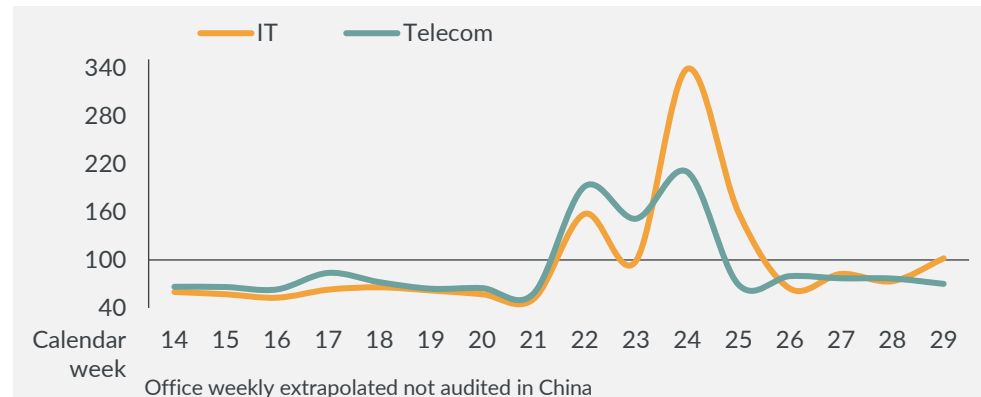
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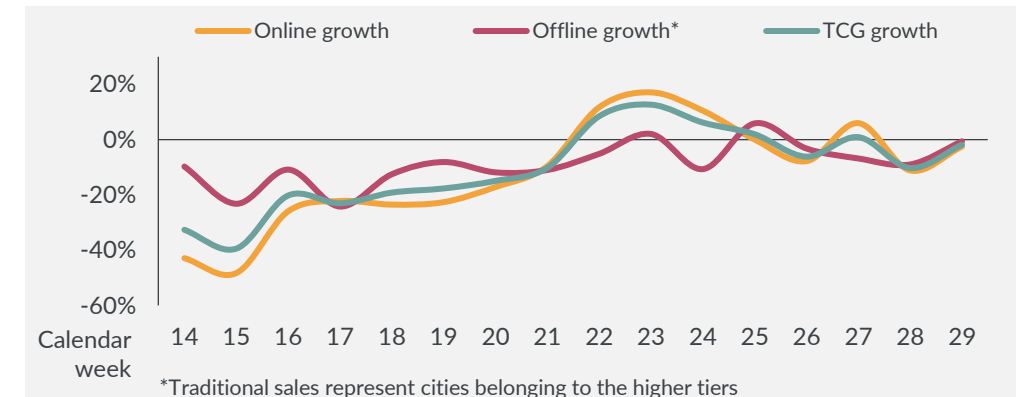
Brazil

> 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 29 (July 18 – July 24)

- Both distribution channels recovered to just slight drops for online sales (-3%) and traditional retail (-1%), leading to a downswing of the total TCG market of 2%.
- Mobile PCs posted an increase of 25%. Smartphones delivered a minus of 9%.
- Week 29 saw a double-digit drop for TV sales (-15%) while washing machines and cooling accelerated by 4% and 18% respectively.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 29 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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