



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 122

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Fact of the week

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Fact of the week:

Market dynamics in Ukraine



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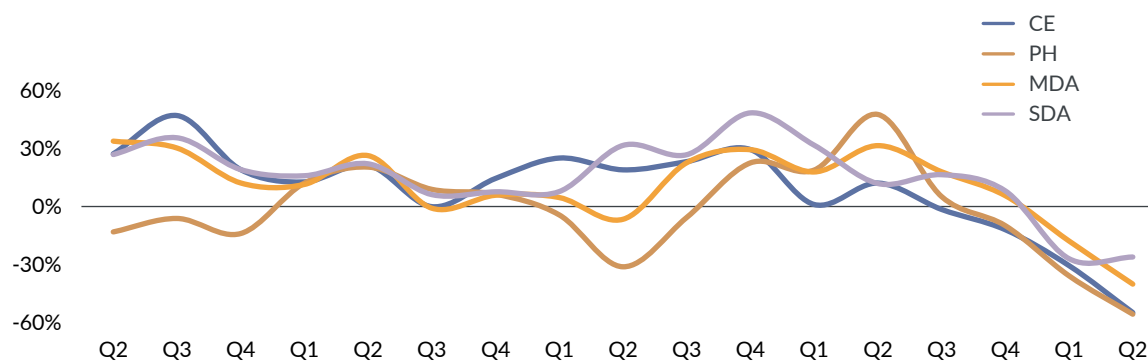
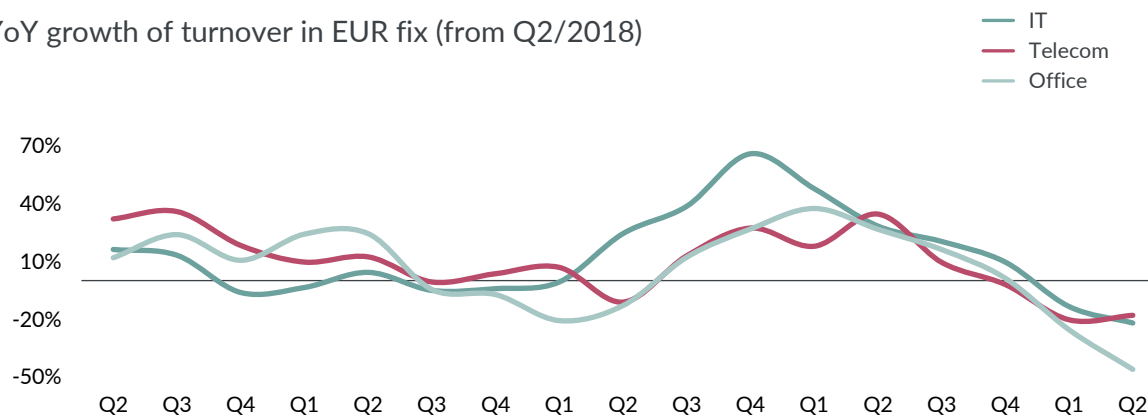
Russia

Japan

Brazil

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YoY growth of turnover in EUR fix (from Q2/2018)



Key take aways

- Despite the negative dynamic in the market due to the Russian invasion, media tablets showed growth by 9% in value EUR compared to the previous year's period (units -17%, price +38%). Visual cams showed a significant decline of 70% in sales value.
- In Q2, the MDA market dropped by 49% in units YoY. Freezers, washing machines, and microwave ovens demonstrated better results as the most essential equipment, while well-being devices – dishwashers, dryers, and hoods – reported below-market figures.
- Fryers grew by 26% and hair clippers by 20% both contributing the most to positive SDA market dynamics. All the other SDA product groups demonstrated a negative dynamic.
- TVs with 43" and 55" inch screen sizes declined least compared to other less popular diagonals.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. North America), EUR fix value & growth Q2/2022 vs Q2/2021, CE incl. Multifunctional Technical Devices, Photo, Small/Major Domestic Appliances, SDA incl. Personal Diagnostics, Telecom, IT, Office

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



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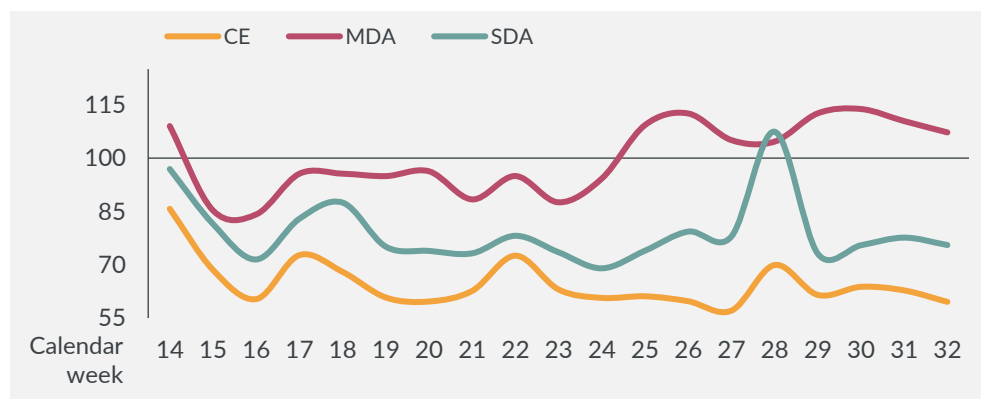
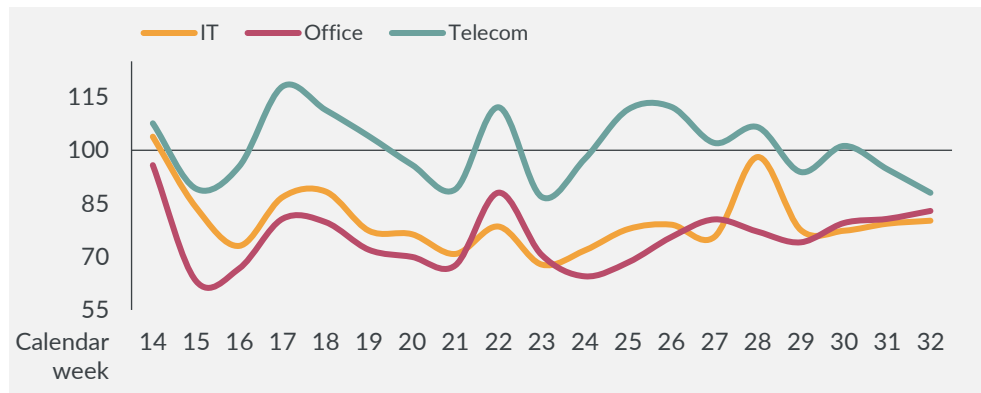
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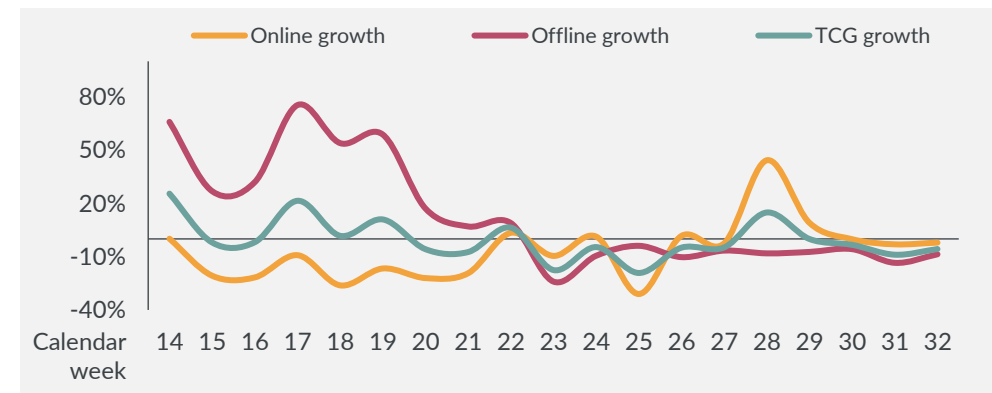
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 32 (August 08 – August 14)

- Traditional retail experienced a minus of 9% vs week 32 in 2021. Online sales at -2% failed to compensate for the losses, leaving total TCG at a minus of 6%.
- Rates for IT/Office product groups ranged from -10% for desk computing to +29% for laser printers. Smartphones were slightly down by 1%.
- There were double-digit losses for most MDA/SDA/CE products. Cooling accelerated by 11%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 32 2022; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop 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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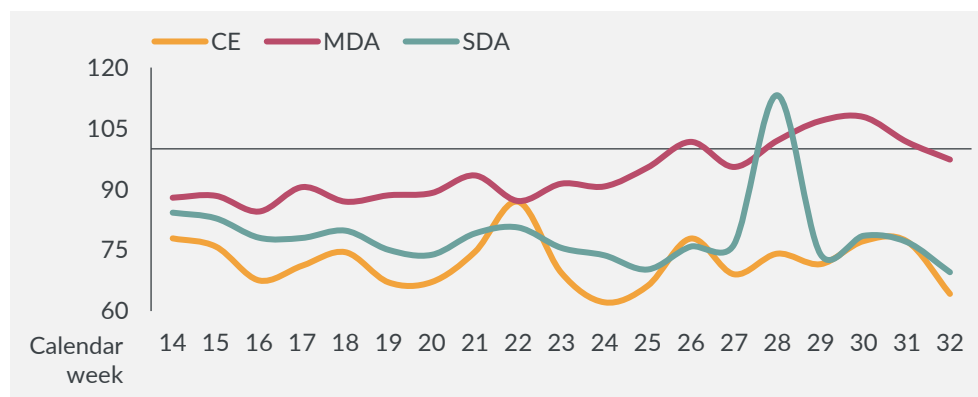
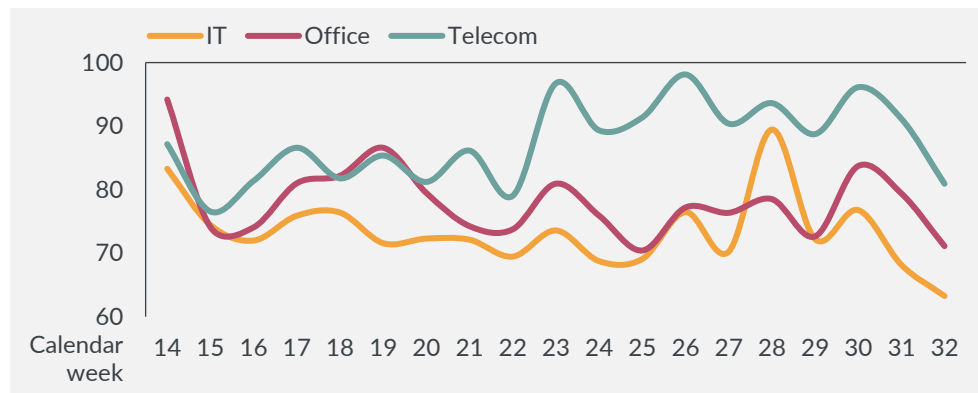
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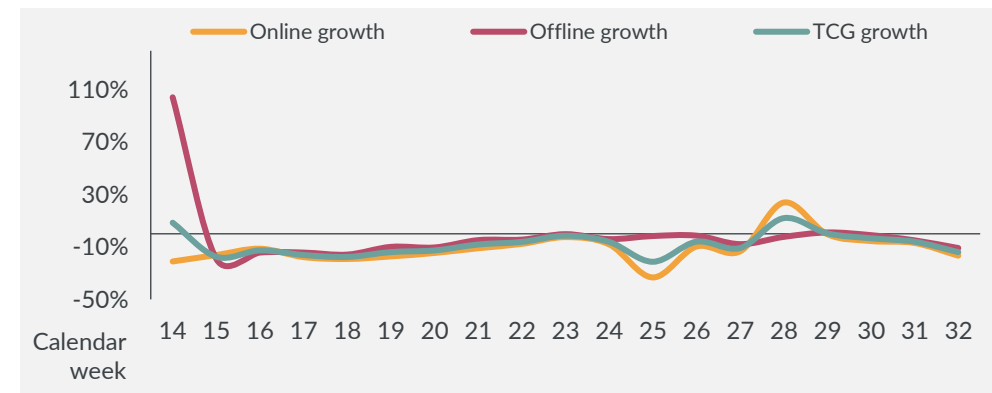
Brazil

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 32 (August 08 – August 14)

- Online sales delivered -17% and traditional retail was down -11%, resulting in a downswing of the total TCG market of -14%.
- Many IT/Office products posted strong negative trends, led by media tablets at -42%. Mice were hit least at -14%. Smartphones lost by 9%. Headsets delivered +2%.
- There were negative trends throughout MDA/SDA/CE products with shavers flat at +0.7%. Vacuum cleaners experienced the biggest decline at -30%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 32 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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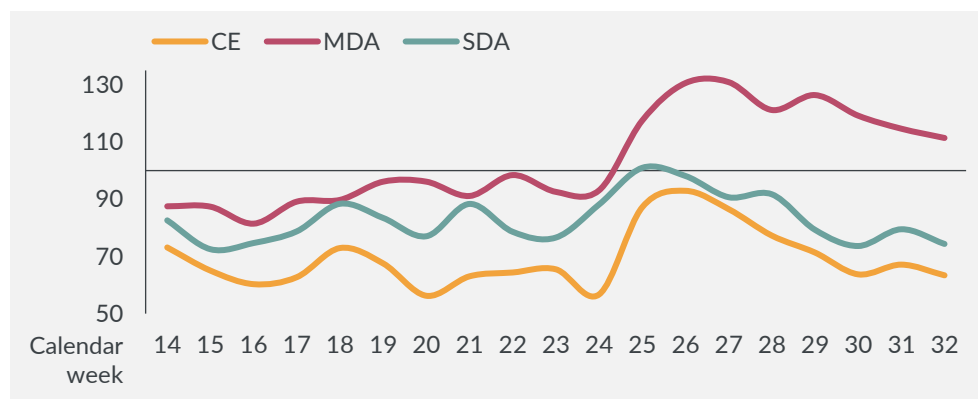
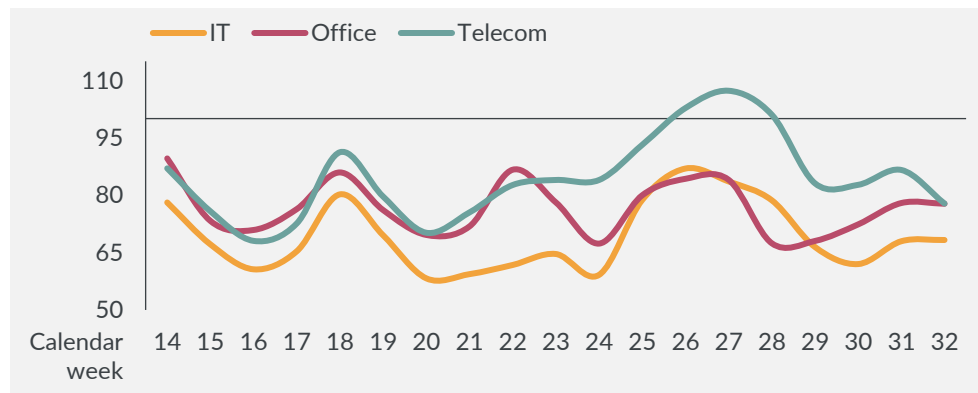
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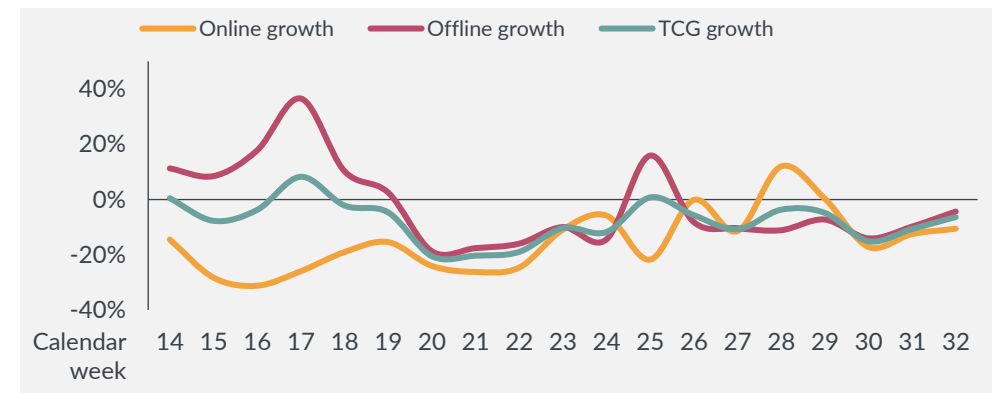
Brazil

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 32 (August 08 – August 14)

- Online sales delivered -11% (-13% the previous week) and traditional retail was down -4% (-10% the previous week), resulting in a downswing of the total TCG market of 6%.
- IT/Office and CE products were negative, ranging from between -23% for desk computing and -5% for inkjet printers and mice. Laser printers posted +17%. Headsets were up 10%.
- Air treatment saw remarkable growth of +71%. Other MDA/SDA products showed a mixed picture. CE categories were down -15%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 32 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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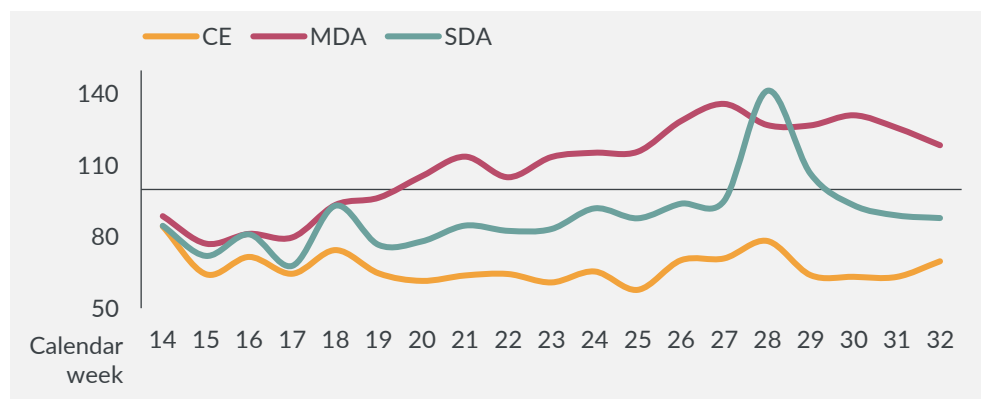
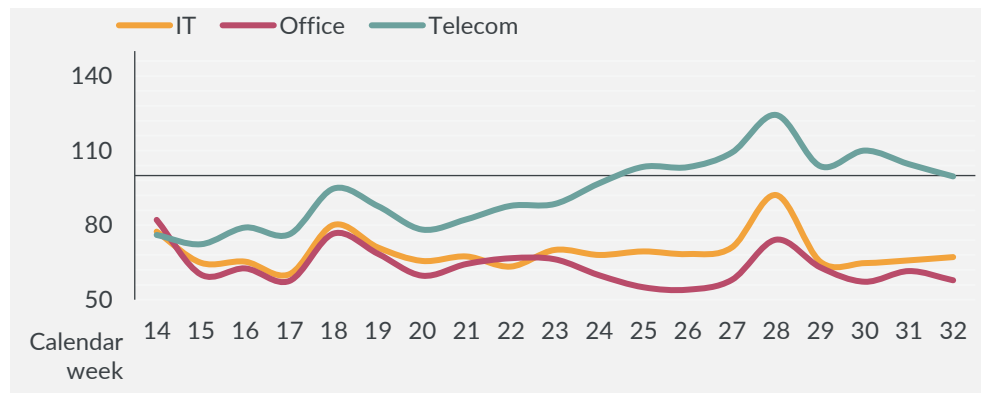
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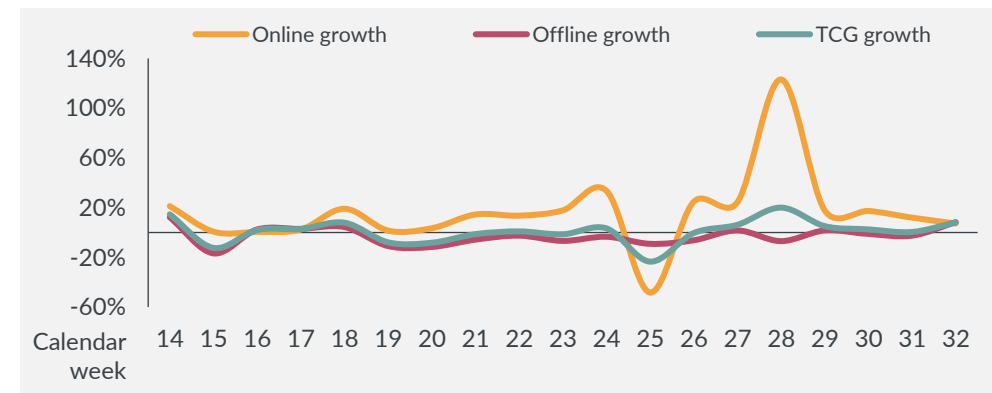
Brazil

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 32 (August 08 – August 14)

- In week 32, both distribution types had nearly identical growth rates of 8% for traditional retail and 7% for online sales, leading to an increase of 8% for the total TCG market.
- IT/Office products were positive, ranging from +0.4% for mobile computing to +21% for media tablets. Desk computing was the exception of -10%. Smartphones accelerated at +12%.
- Vacuum cleaners were the category hit most in week 32 (-66%), while most other MDA/SDA/CE products posted a positive trend.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 32 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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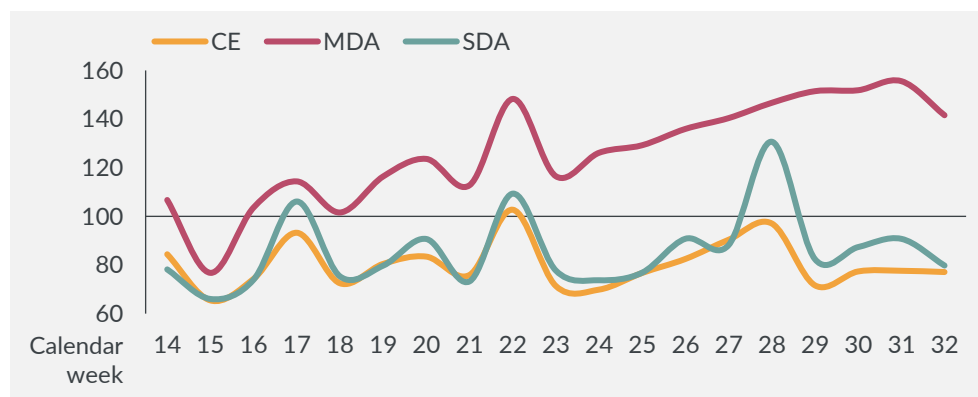
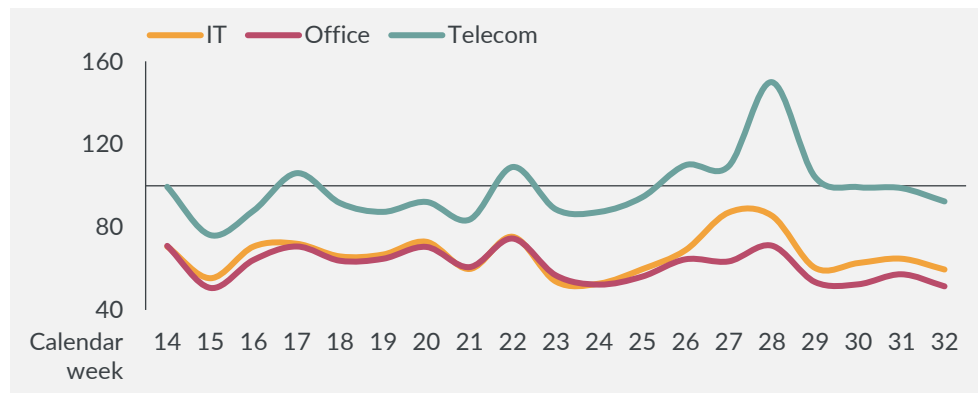
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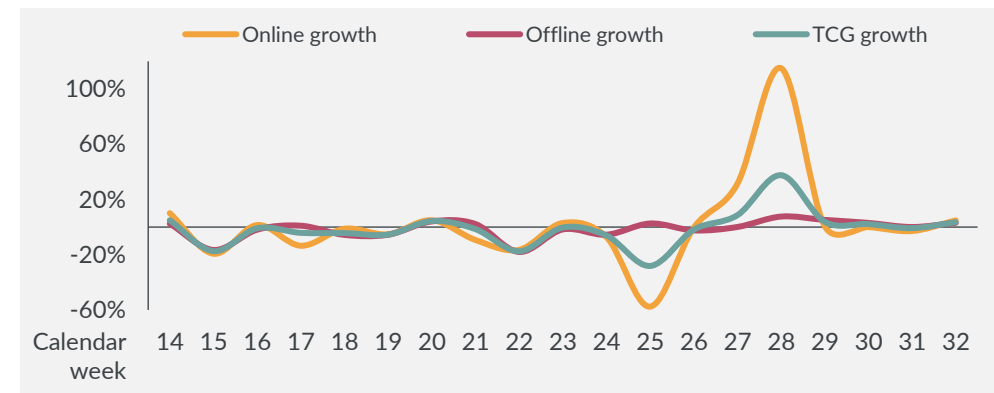
Brazil

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 32 (August 08 – August 14)

- Online sales accelerated by 5% and traditional retail posted +3% which led to growth of 4% for the total TCG market.
- Desk computing was the category with the biggest loss (-28%). All other IT/Office product groups were less negative. Smartphones were flat (-0.3%).
- Cooling was the ray of light in week 32 at +26%. All other MDA and SDA products posted slight increases of less than 10%. TV sales lagged at -2%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 32 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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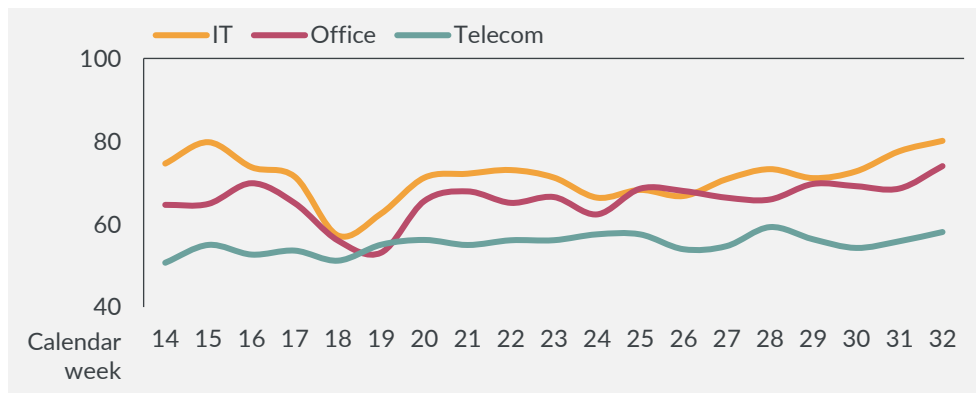
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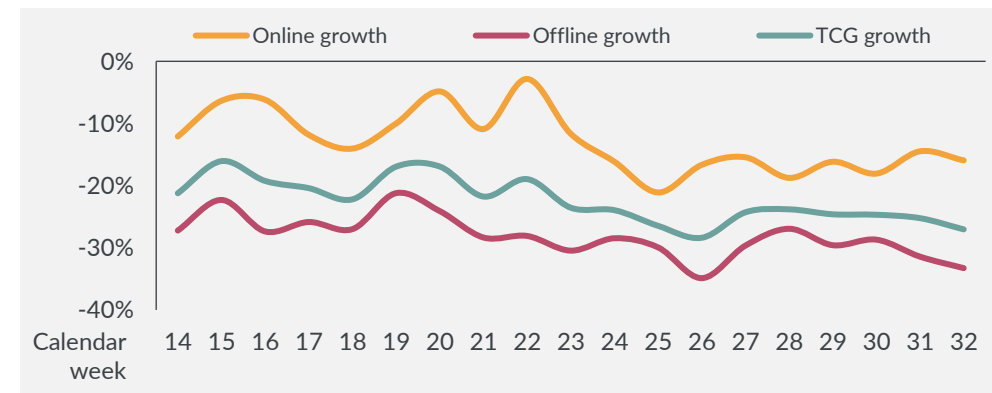
Brazil

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 32 (August 08 – August 14)

- The total TCG market continued its negative trend (-27%), driven by traditional retail at -33%. Online sales performed better but were still down by 16%.
- The most impacted product groups were smartphones and media tablets at -44% and -43% respectively. Monitors were up 22%.
- Audio home systems posted an outstanding growth of +67% while MDAs were down 9%. SDA products overall were flat with losses for vacuum cleaners (-8%) and shavers (-4%).

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 32 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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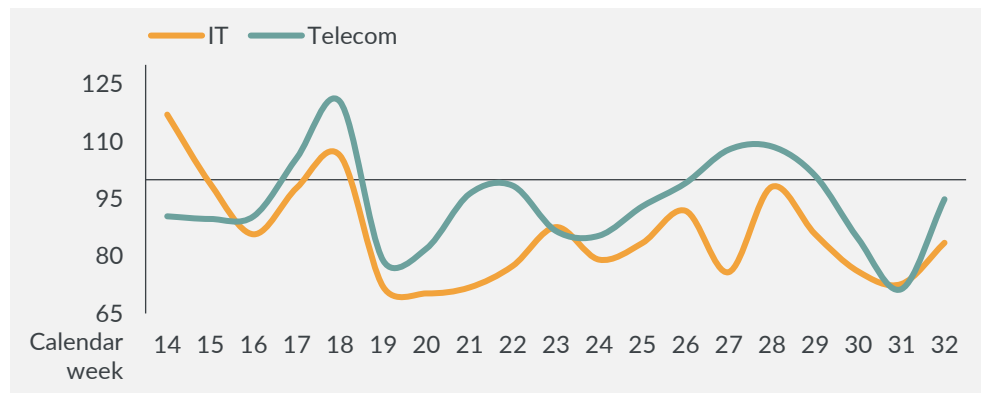
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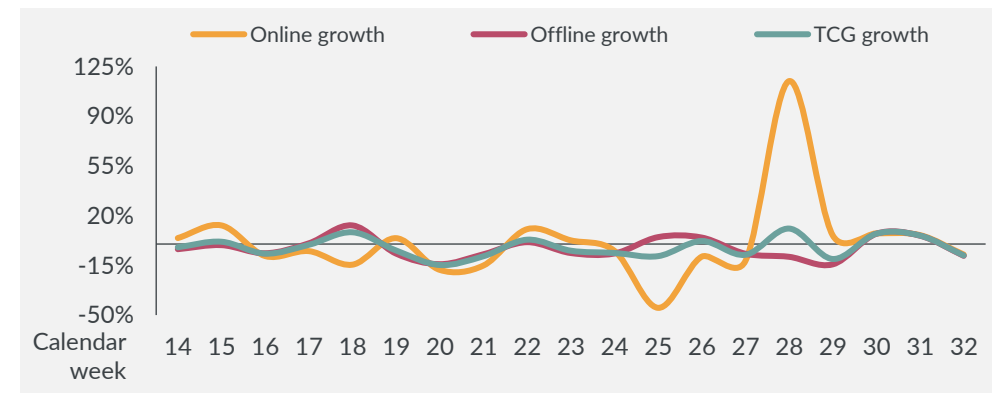
Brazil

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 32 (August 08 – August 14)

- Both distribution types experienced nearly identical trends of -7% for online sales and -8% for traditional retail, leading to a decrease for total TCG of 8%.
- Mobile computing was up 2%. Media tablets fell by 12%. Smartphones posted deceleration of 8%.
- All MDA/SDA/CE products delivered mostly double-digit negative trends, ranging from -28% for audio home systems to -1% for dental care.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 32 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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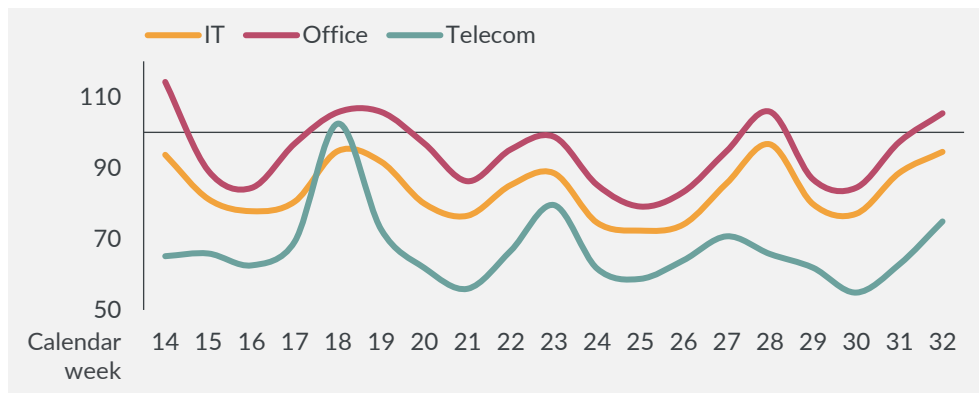
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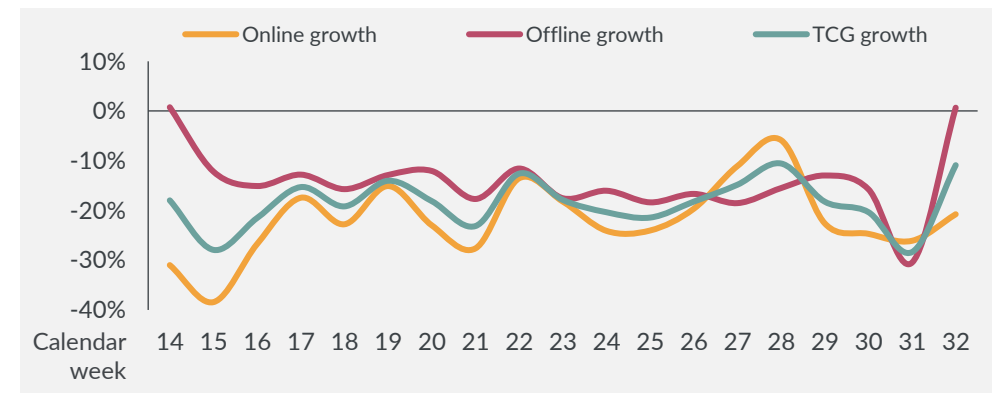
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China

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 31 (August 01 – August 07)

- After 17 weeks of double-digit losses, traditional retail slightly increased by +1%. As online sales continued to post a double-digit decline (-21%), the total TCG market remained on a downward trend (-28%).
- Trends for IT/Office and CE products ranged from -24% for smartphones to +8% for media tablets.
- Shavers were the ray of light in week 32 at +91%. Food preparation, TV, and audio home systems delivered double-digit growth, too.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 31 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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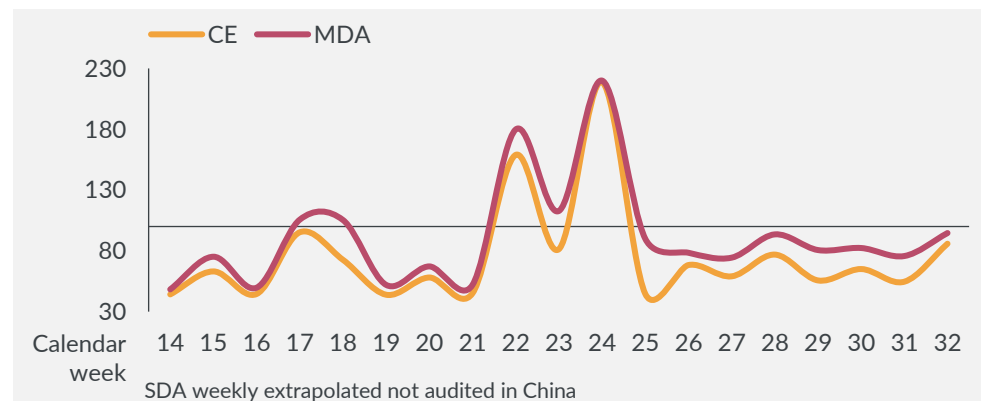
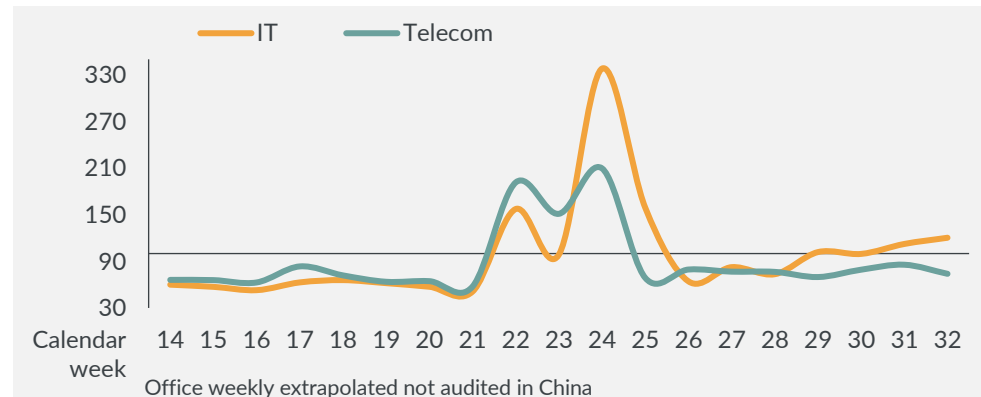
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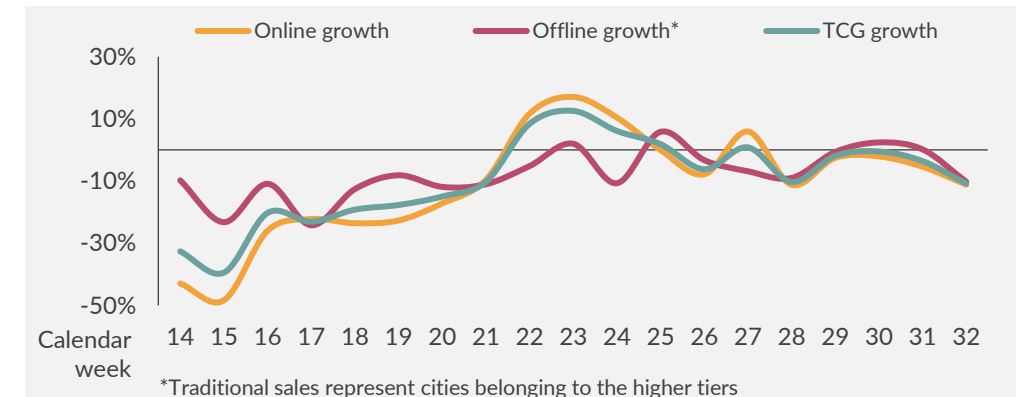
Brazil

> 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 32 (August 08 – August 14)

- Nearly identical deceleration rates for traditional retail (-10%) and online sales (-11%) led to a downswing for the total TCG market of 11%.
- While mobile PCs delivered a slight upswing of 2%, smartphones declined by 13%.
- Week 32 saw double-digit for washing machines (-22%) and cooling (-11%). TV sales recovered a little and posted -9% (compared to double-digit losses in the past three weeks).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 32 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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