



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 123

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> About gfknewron

Fact of the week

Germany

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Italy

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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: Ongoing market disruptions halt the premium brands' growth.



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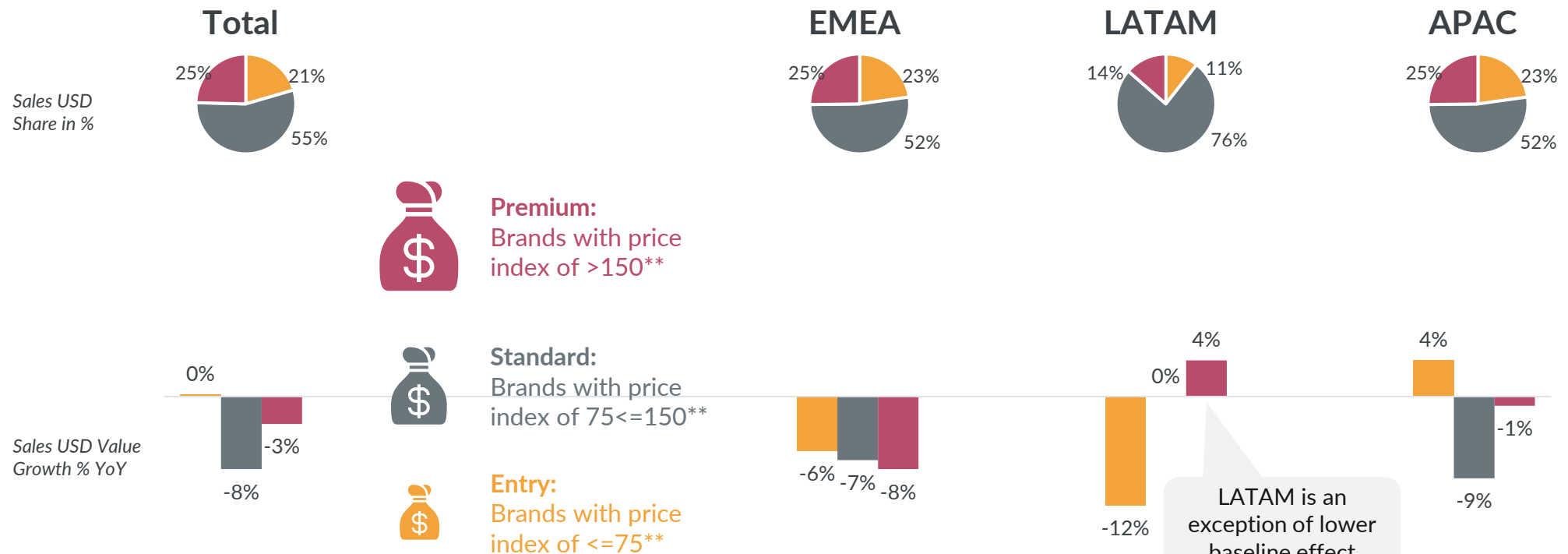
Russia

Japan

Brazil

China

Sales value & growth | 2022 vs 2021 | Jan 22 - Jun 22 | Key TCG product groups*



Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America), USD (NSP). *Cooling, Washing Machines, Air Treatment, Vacuum Cleaners, Shavers, Food preparation, Dental Care, Hot Beverage Makers, Mobile Computing, Monitors, Pointing Dev, Keying Dev, Media Tablets, Smartphones, Laser Print Dev, Inkjet Print Dev, PTV/FLAT, Soundbar/base, Audio home sys, Desk computing ex. Media Box & Media Stick, Headphones, Headsets. ** Price Index per brand is aggregated up from a country/product group level to use comparable price index information within one country and product group. E.g., price index of Bosch in Germany/fridges is used for the analysis, not price index of Bosch across all product groups (to avoid bias).

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



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Fact of the week

> Germany

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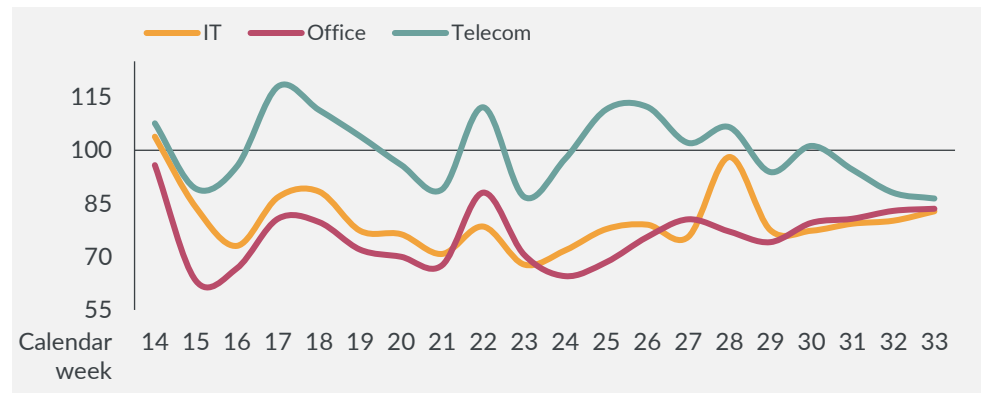
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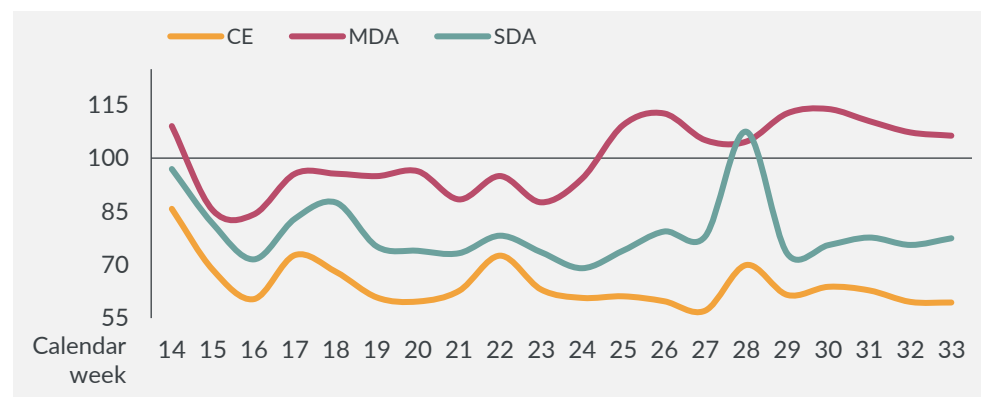
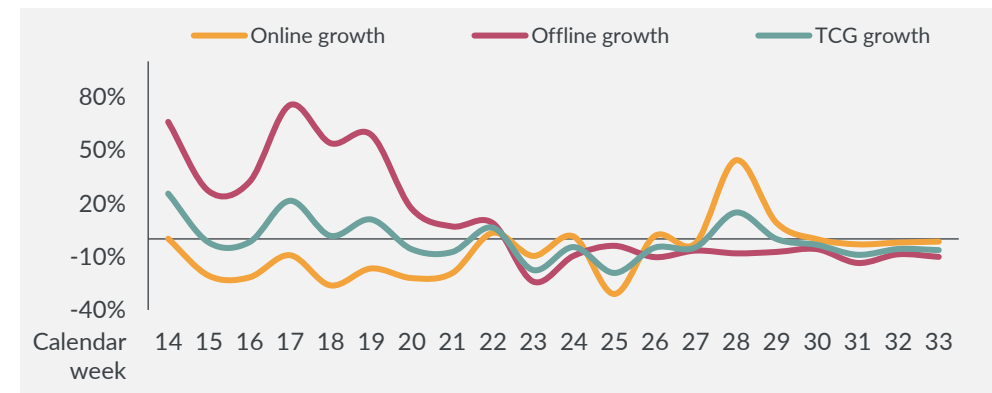
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 33 (August 15 – August 21)

- Traditional retail experienced a minus of 10% versus week 33 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 -15% for desk computing to +28% for laser printers. Smartphones were slightly down by 1%.
- There were double-digit losses for many MDA/SDA/CE products, but TV sales were hit the most at -31%. Cooling grew by 13%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 33 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

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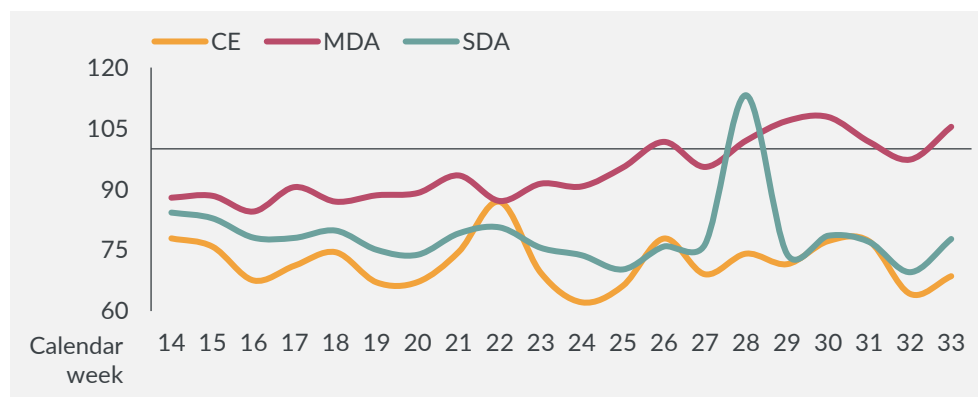
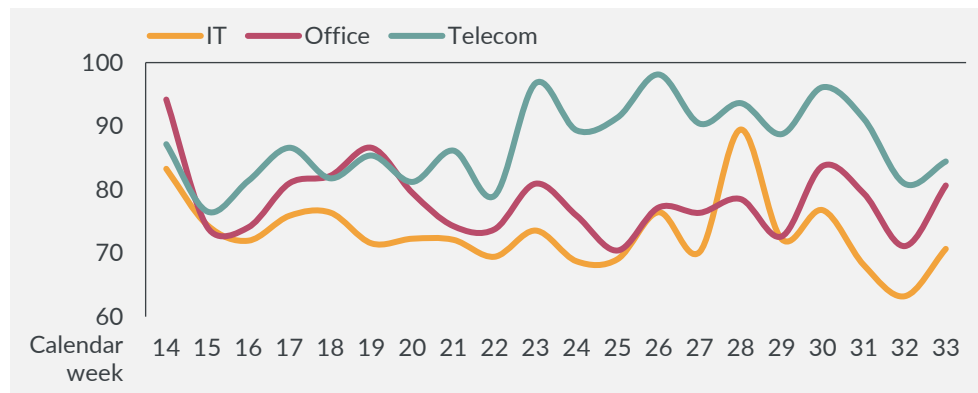
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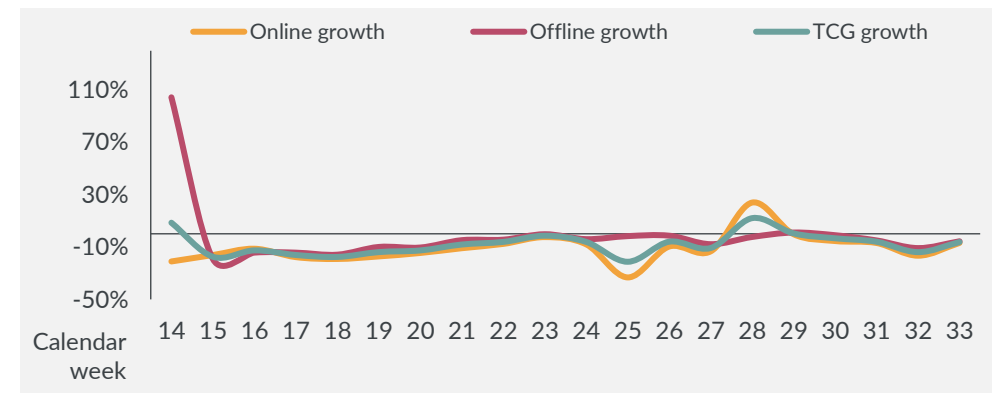
Brazil

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 33 (August 15 – August 21)

- Online sales delivered -7% and traditional retail was down -6%, resulting in a downswing of the total TCG market of -6%.
- Many IT/Office products posted negative trends, led by media tablets at -31%. Laser printers were the best performing category at +30%. Smartphones were flat.
- Except cooling at +14%, there were negative trends for MDA/SDA/CE products. Shavers, which were flat, were hit the least. PTV and soundbars posted the biggest decline at -19% each.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 33 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

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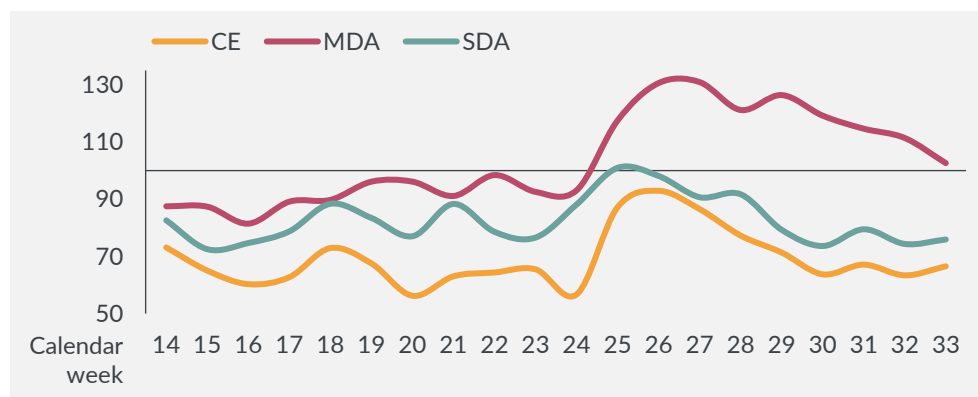
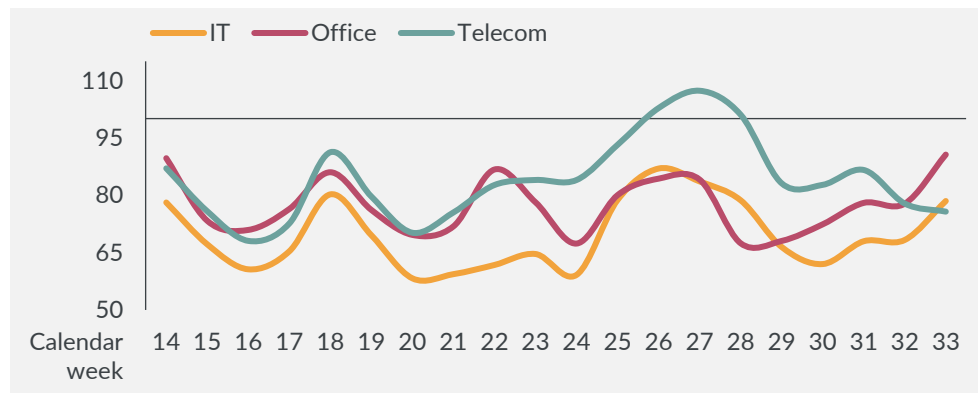
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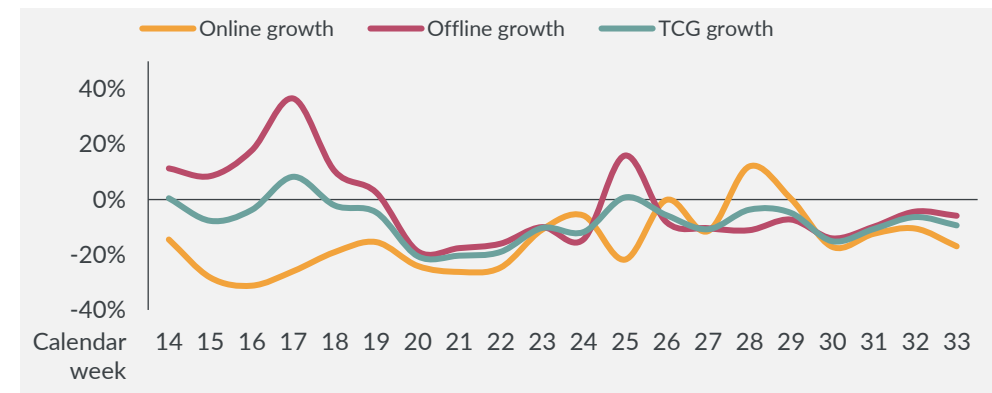
Brazil

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 33 (August 15 – August 21)

- Online sales delivered -17% (-11% the previous week) and traditional retail was down -6% (-4% the previous week), resulting in a downswing of the total TCG market of 9%.
- IT/Office and CE products were negative, ranging from between -22% for desk computing to -3% for inkjet printers. Laser printers posted +4%. Headsets were up 3%.
- After 6 weeks of extraordinary growth, air treatment was down by 29% in week 33. Vacuum cleaners and dental care posted increases.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 33 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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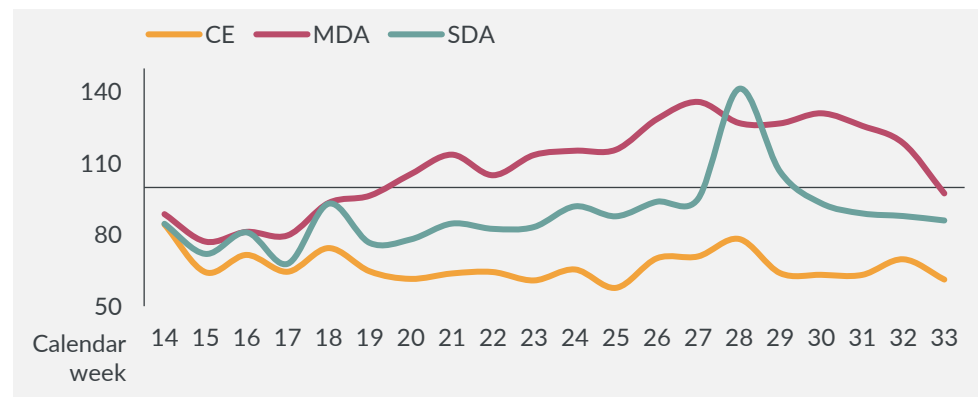
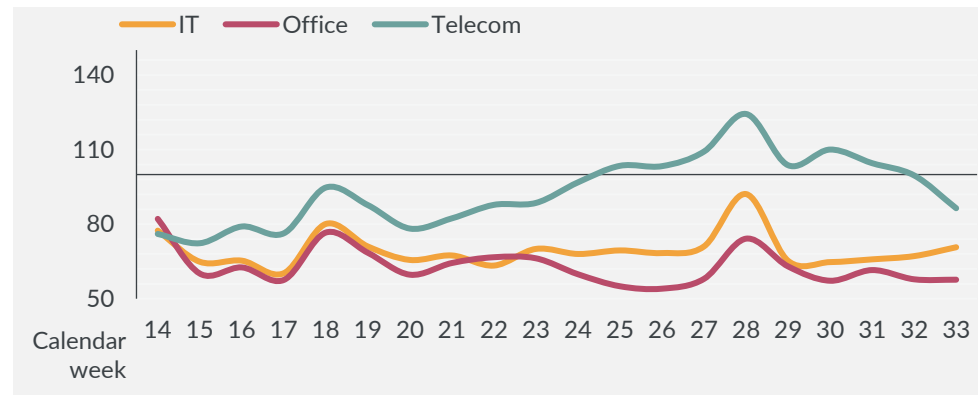
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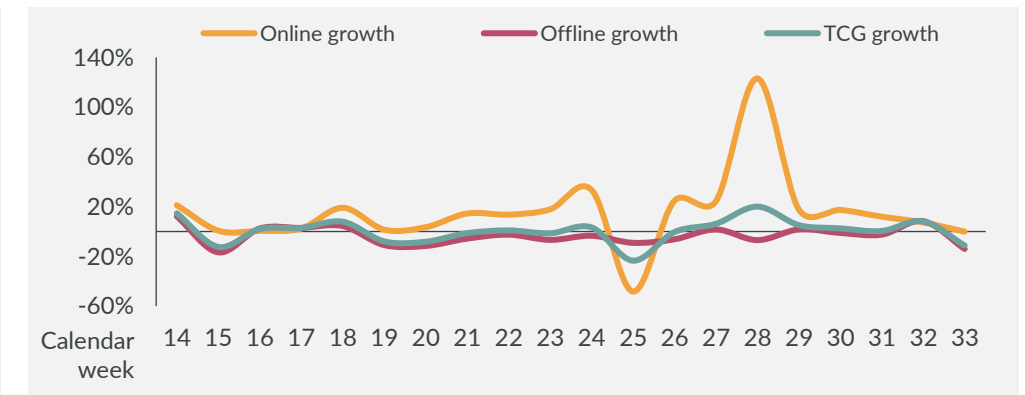
Brazil

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 33 (August 15 – August 21)

- As online sales were flat, the decrease of traditional retail (-14%) dragged the total TCG market into decline (-11%).
- IT/Office products ranged from -22% for desk computing to -6% for laser printers. Smartphones decelerated at -11%.
- While CE products lost in double-digits, SDA categories delivered a mixed picture with hot beverage makers out in front at -16% and air treatment bringing up the rear at -56%. Cooling posted -16% and washing machines were down 8%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 33 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, 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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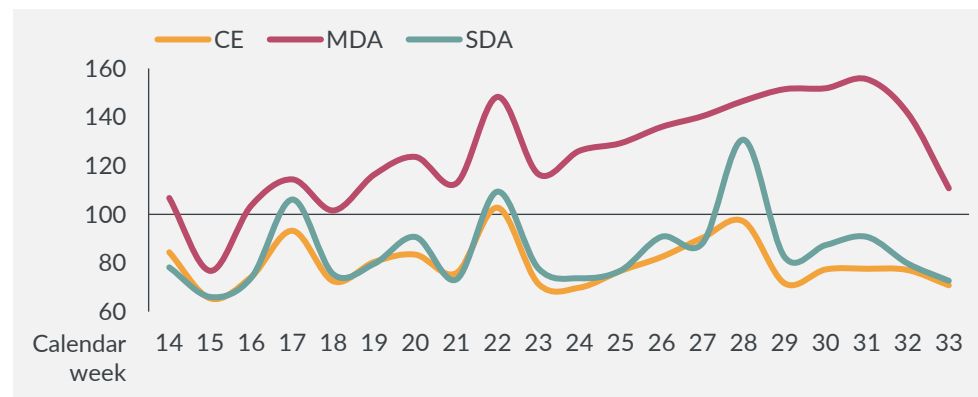
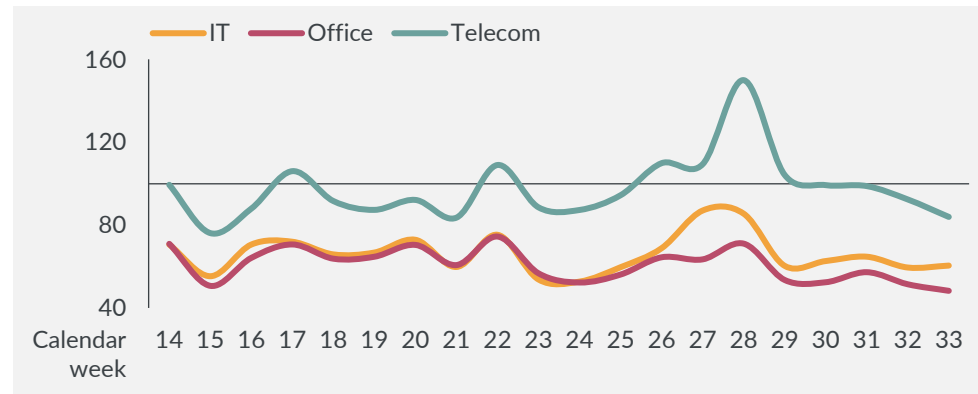
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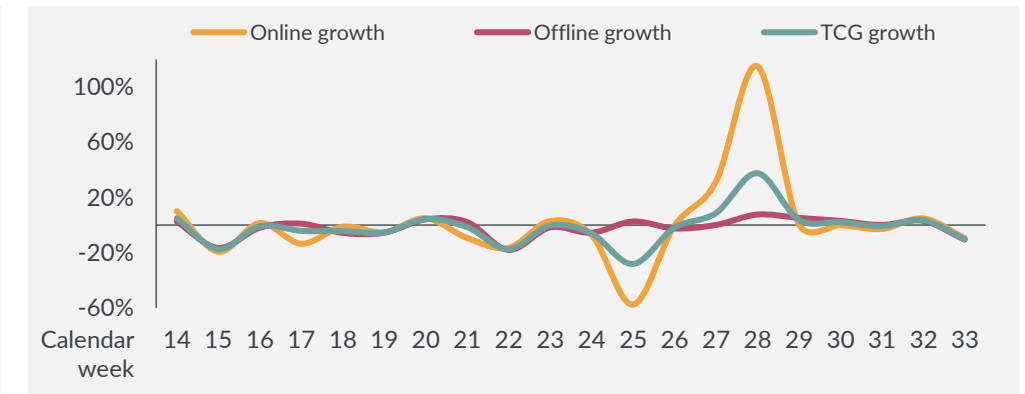
Brazil

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 33 (August 15 – August 21)

- Online sales decelerated by 9% and traditional retail posted -11% which led to a decline of 10% for the total TCG market.
- The desk computing category suffered the biggest loss (-28%). All other IT/Office product groups were less negative, and laser printers were hit the least at -7%. Smartphones declined by 10%.
- MDA/SDA/CE products witnessed negative trends throughout, ranging from -14% for inkjet printers to -0.8% for hot beverage makers - which were almost flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 33 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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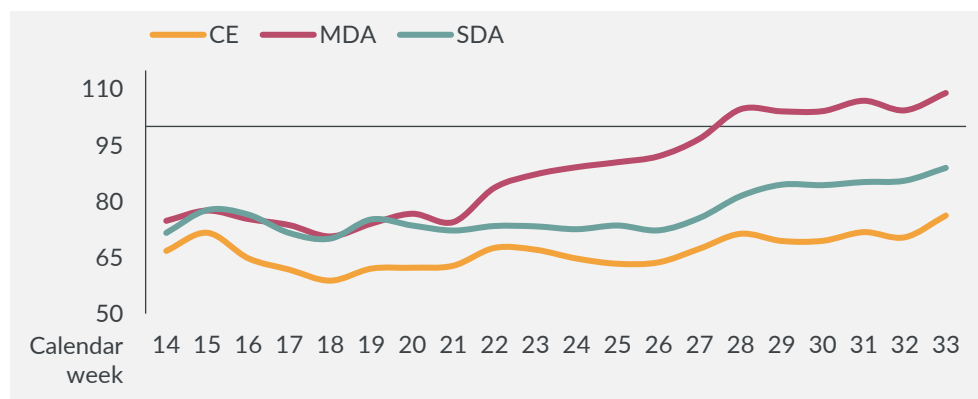
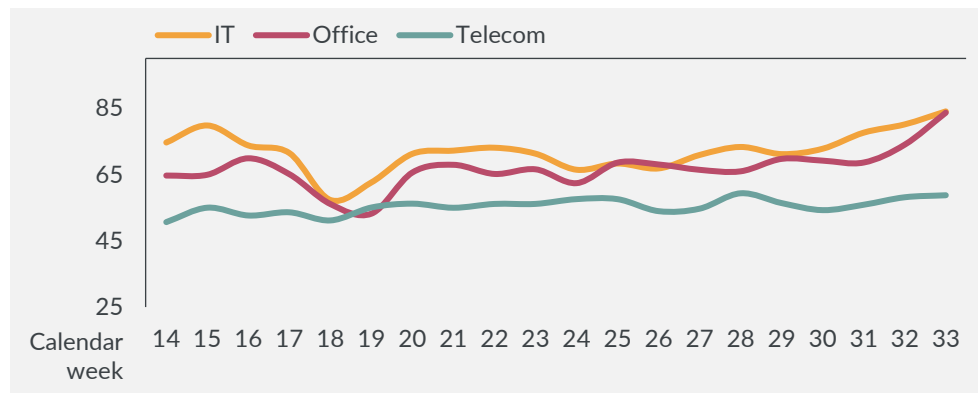
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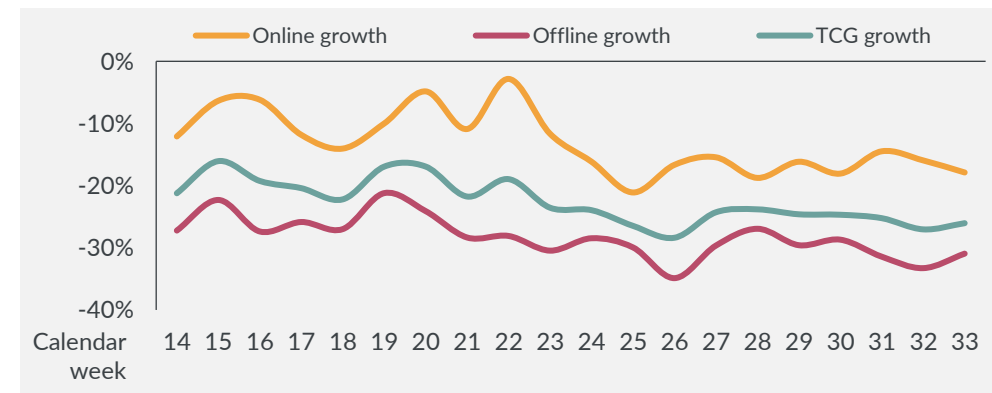
Brazil

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 33 (August 15 – August 21)

- The total TCG market continued its negative trend (-26%), driven by traditional retail at -31%. Online sales performed better but were still down by 18%.
- The most impacted product groups were smartphones and media tablets at -44% and -42% respectively. Monitors were up 19%.
- Audio home systems posted an outstanding growth of +111% while MDAs were down 5%. SDA products delivered an overall positive picture. Vacuum cleaners and shavers lagged at -1%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 33 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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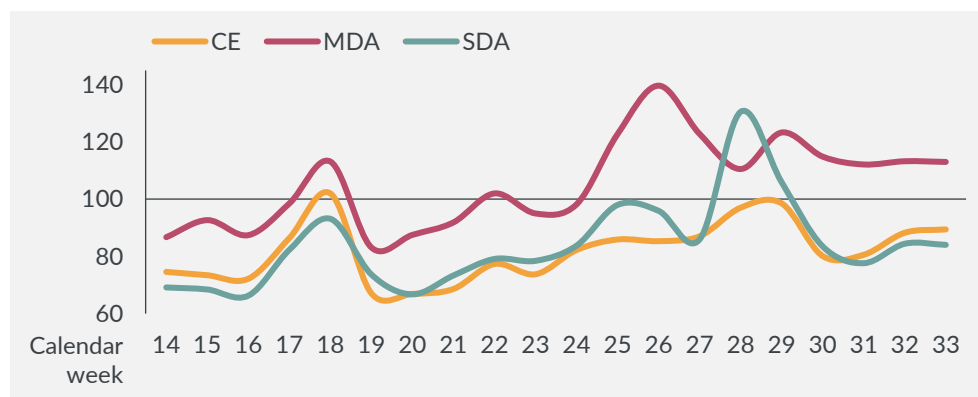
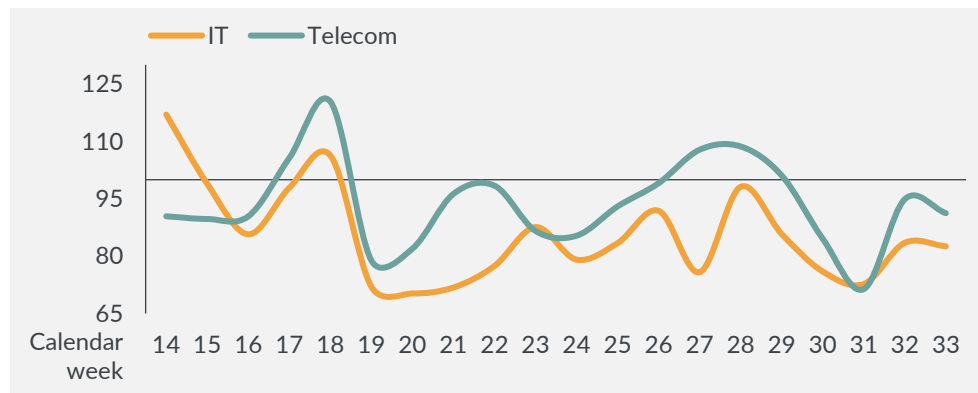
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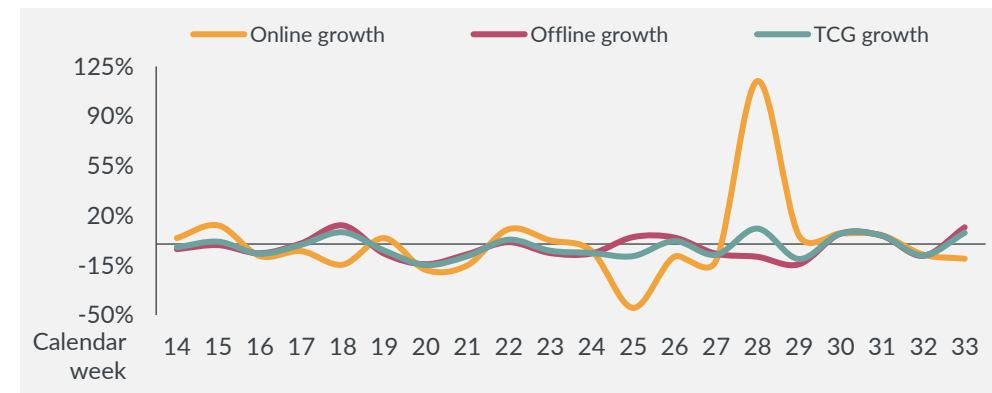
Brazil

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 33 (August 15 – August 21)

- Traditional retail at +12% balanced the loss of 10% for online sales. Due to the higher share of traditional retail, the total TCG market won by 10%.
- Smartphones posted a remarkable increase of +34%. Mobile computing was up 9%. Media tablets and headsets fell by 0.7%.
- MDA/SDA/CE products delivered a mixed picture, ranging from +23% for cooling to -31% for air treatment. TV sales witnessed a downswing of 5%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 33 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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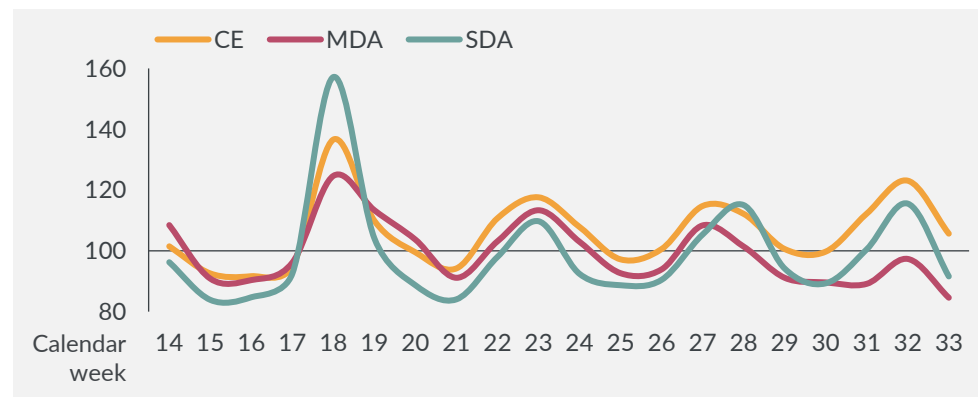
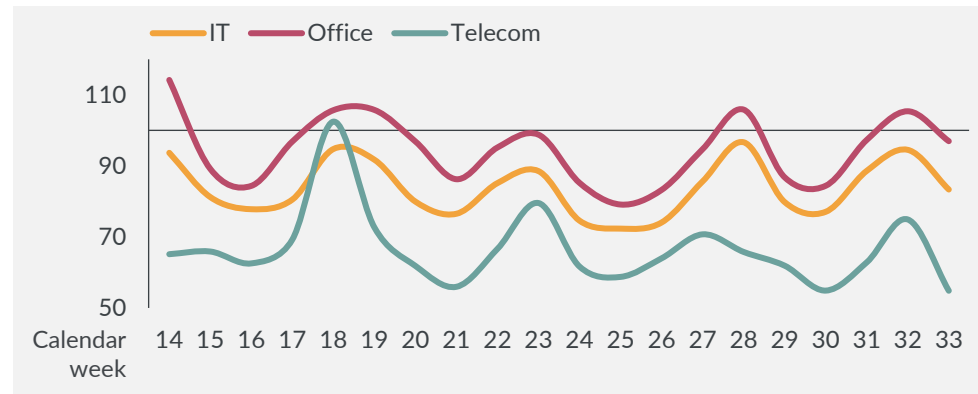
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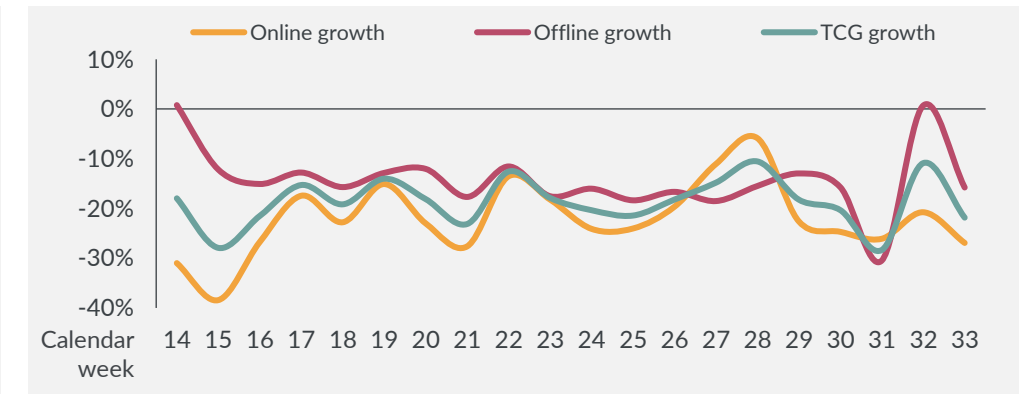
> Brazil

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 33 (August 15 – August 21)

- After a slight recovery in week 32, both traditional retail (-16%) and online sales (-27%) decreased just as they had in previous weeks. Total TCG posted a downward trend of -22%.
- Smartphones posted a strong negative rate (-40%). Trends for IT/Office products ranged from -18% for mobile computing to +5% for media tablets.
- There was a mainly declining picture for MDA/SDA/CE products with exceptions for hot beverage makers (+10%) and TV (+21%).

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 33 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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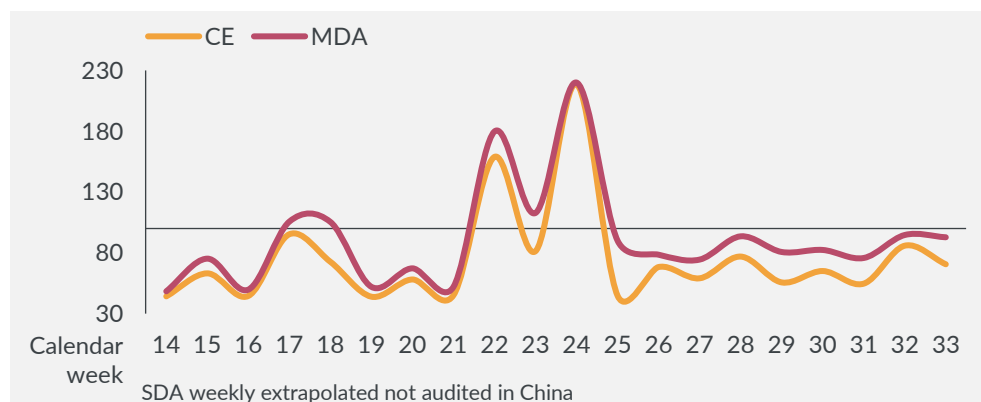
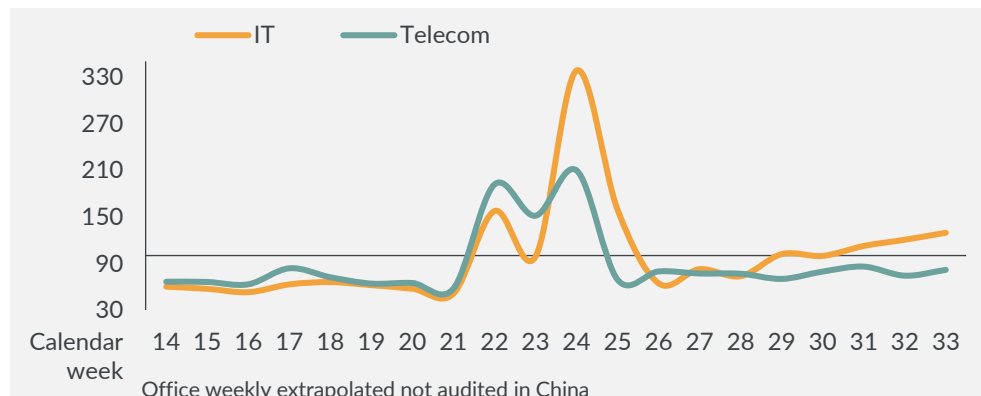
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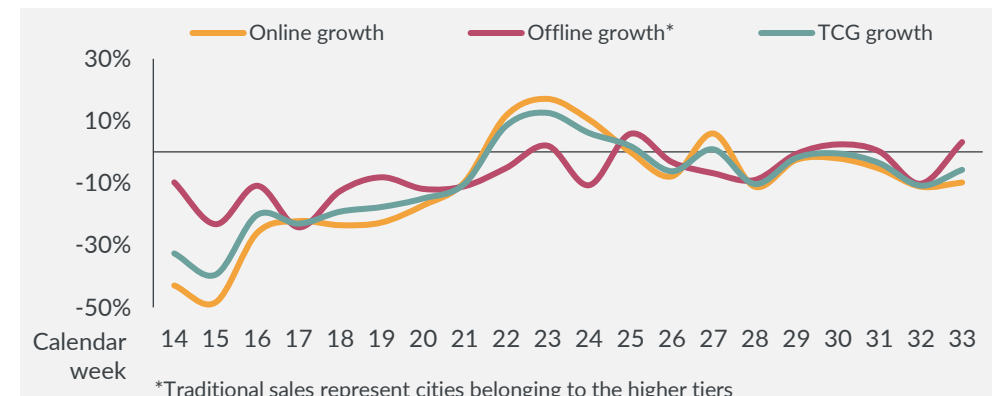
Brazil

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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 33 (August 15 – August 21)

- Positive traditional retail (+3%) mitigated the loss for total TCG (-6%) which was driven by online sales at -10%.
- While mobile PCs accelerated by 10%, smartphones delivered a minus of 9%.
- Week 33 saw double-digit drops for TV sales (-14%) and washing machines (-10%), while cooling delivered just a slight loss of 2%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 33 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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