



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 129

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gfknewron



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> About gfknewron

Fact of the week

Germany

Great Britain

France

Italy

Spain

Russia

Japan

Brazil

China

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:

European consumer climate at new historic low



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> Fact of the week

Germany

Great Britain

France

Italy

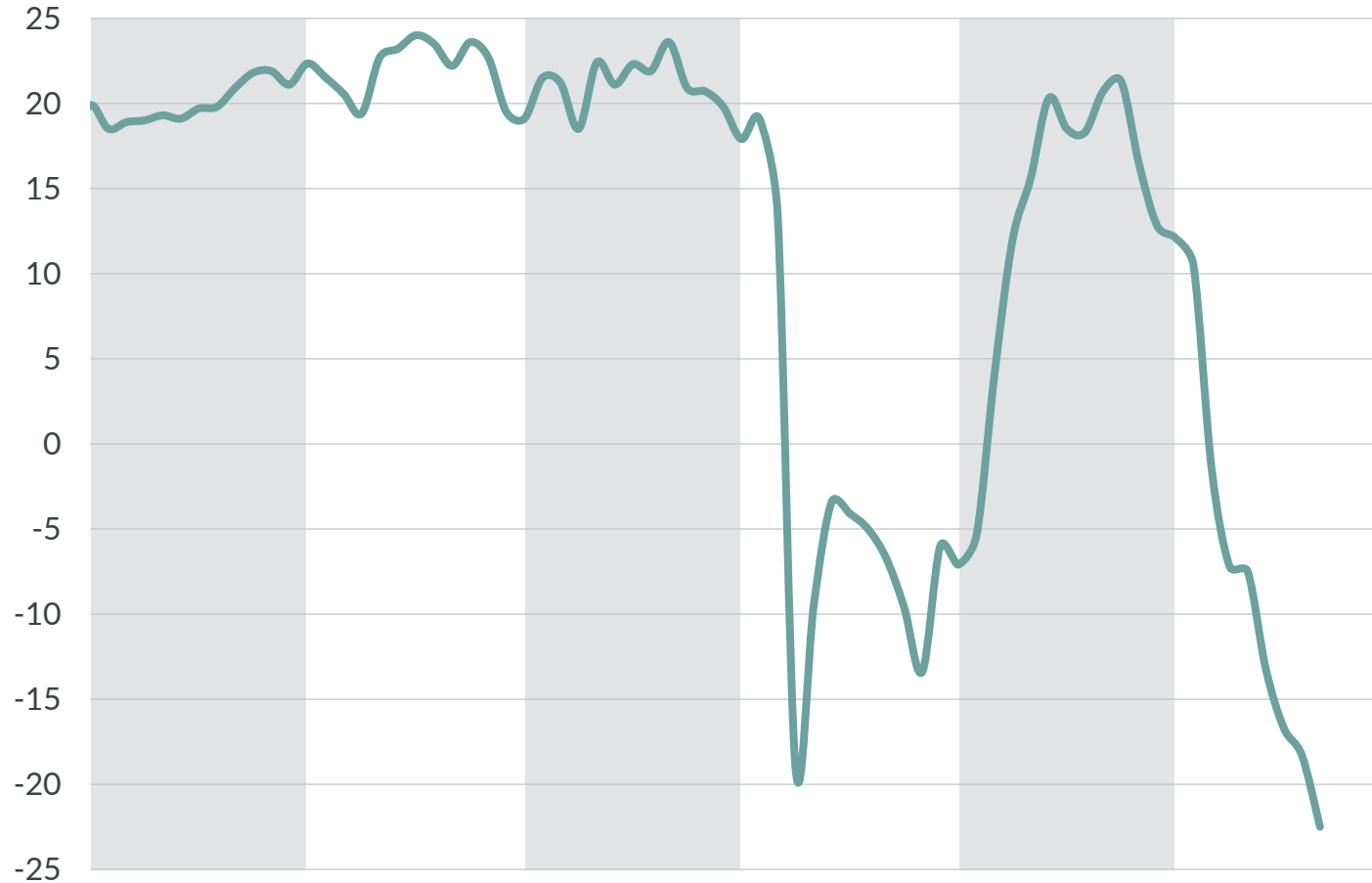
Spain

Russia

Japan

Brazil

China



Economic expectations

Index: -42 | +/- vs prev. month: -7%



Income expectations

Index: -57 | +/- vs prev. month: -13%



Willingness to buy

Index: -32 | +/- vs prev. month: -4%

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



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Fact of the week

> Germany

Great Britain

France

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Spain

Russia

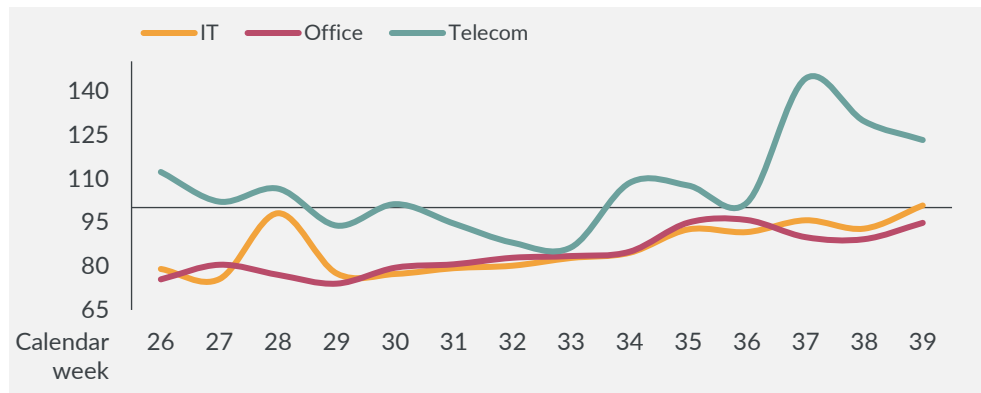
Japan

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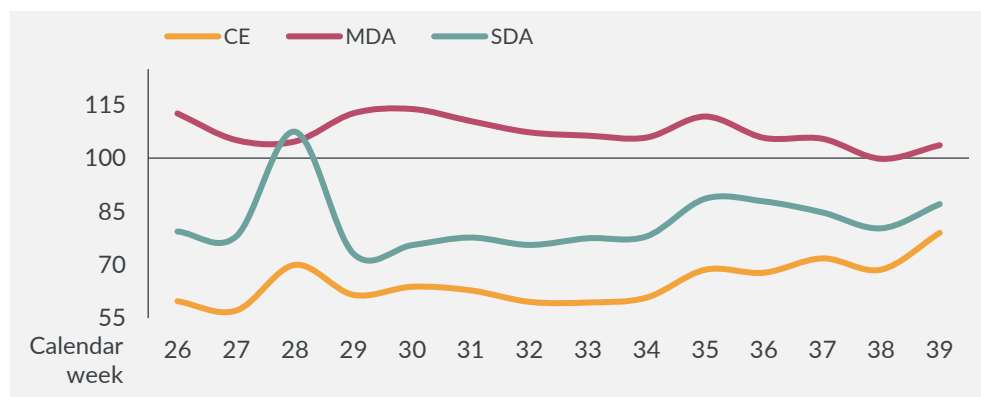
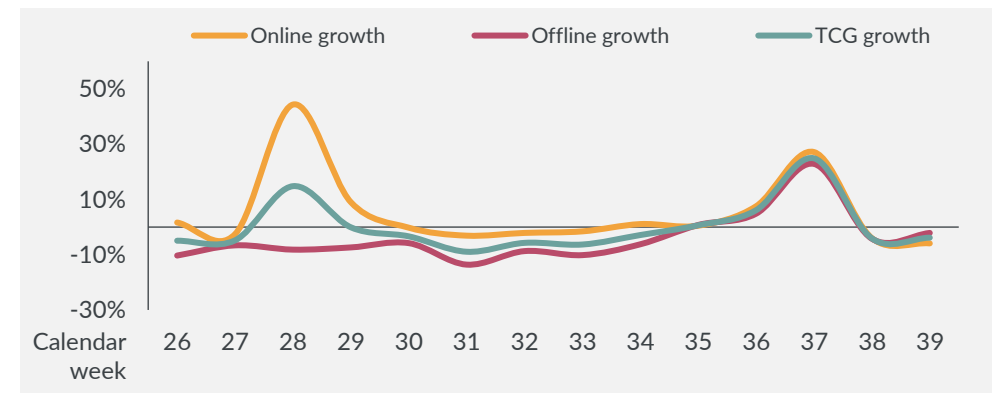
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 39 (Sep 26 - Oct 02)

- Online sales experienced a minus of 6% vs week 39 in 2021. Traditional retail at -2% failed to compensate for the losses, leaving total TCG at a minus of 4%.
- Rates for IT/Office products ranged from +11% for monitors to -8% for inkjet printers. Smartphones were down by 2%.
- Except for cooling at +2%, there were negative trends for all other MDA/SDA/CE products, with TV sales the highest at -17%. Food preparation posted -13%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 39 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

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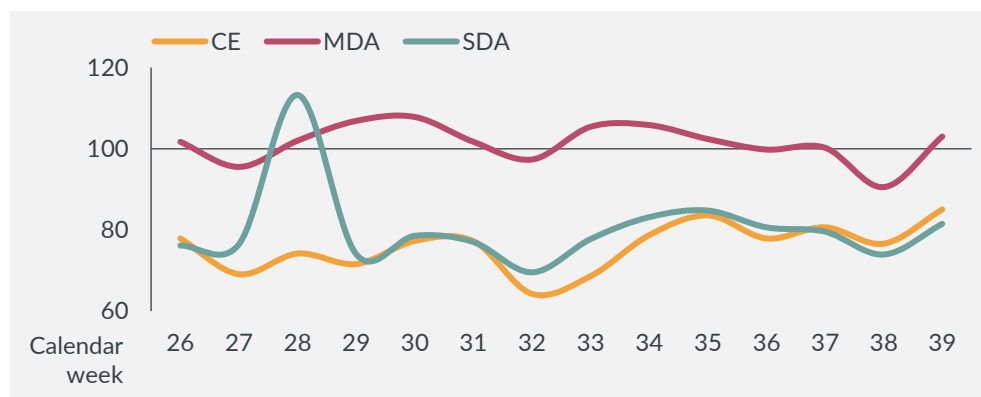
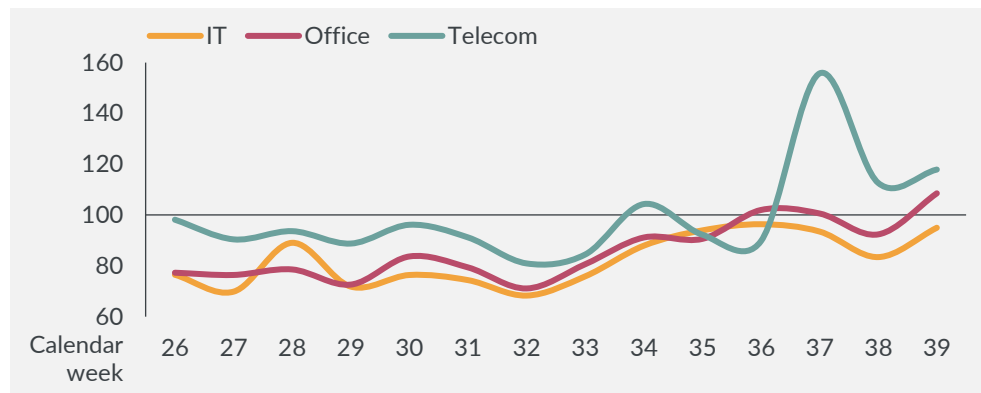
Russia

Japan

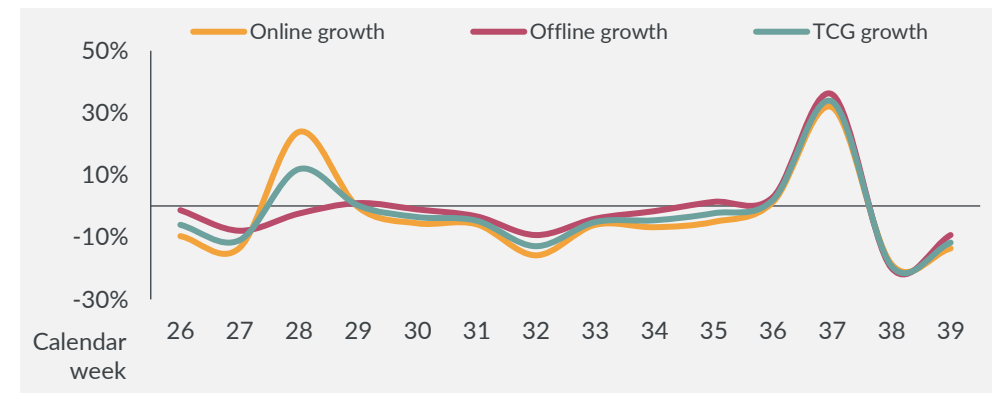
Brazil

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 39 (Sep 26 - Oct 02)

- Online sales delivered -14% and traditional retail fell -9%, resulting in a downswing of the total TCG market of -12%.
- All IT products posted double-digit negative trends, with media tablets, keyboards, and desk computing at -19%. Laser printers posted +35%. Smartphones lost by 15%. Headsets delivered +14%.
- MDA/SDA/CE products posted mostly negative trends for products with dental care (+0.4%) and shavers (-0.5%) impacted the least. Soundbars experienced a decline of -16%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 39 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

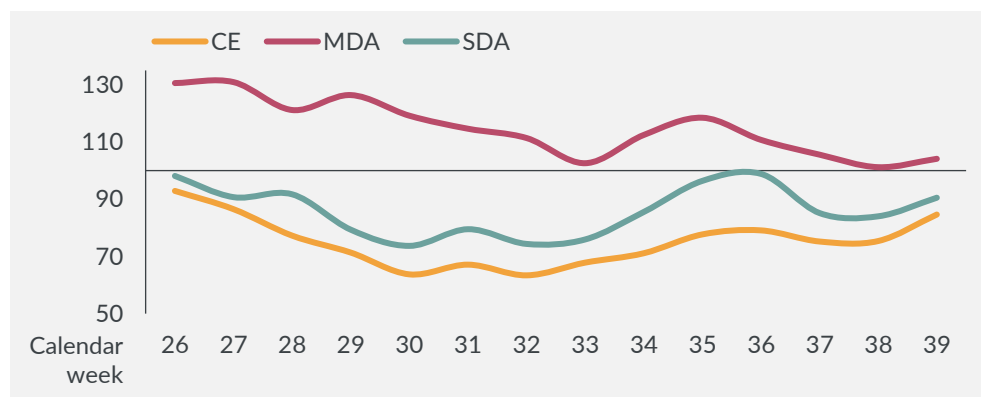
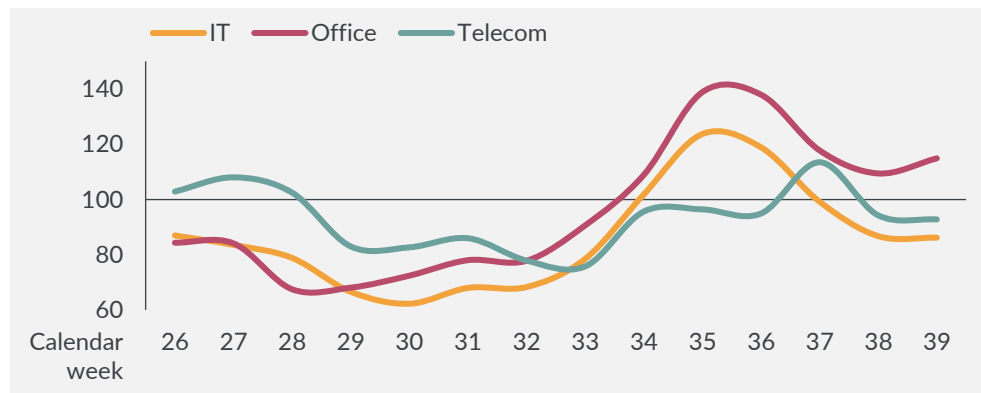
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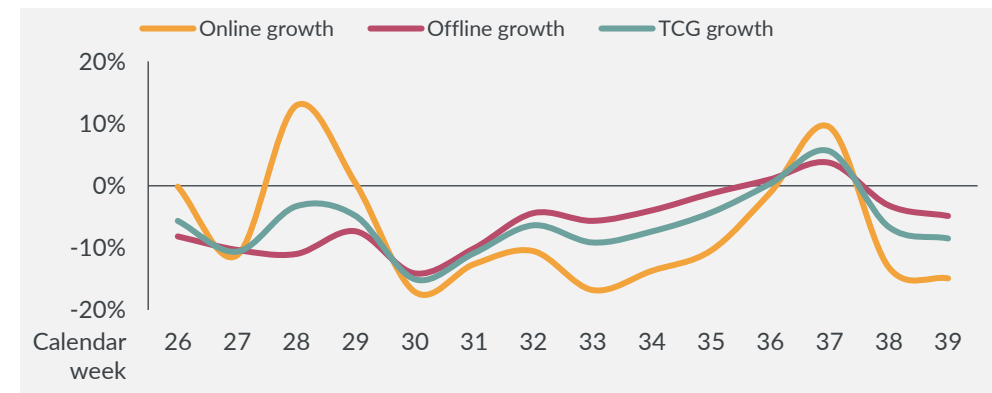
Brazil

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 39 (Sep 26 - Oct 02)

- Online sales delivered -15% (-13% the previous week) and traditional retail was down -5% (-3% the previous week), resulting in a downswing of the total TCG market of 8%.
- IT products were negative, ranging from -2% for mice to -24% for desk computing. Smartphones slumped at -21%. Laser printers delivered a strong performance of 11% and inkjet printers 6%
- Air treatment saw a remarkable decline of -30%. Cooling (+3%), vacuum cleaners (+3%), and soundbars (+10%) were positive.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 39 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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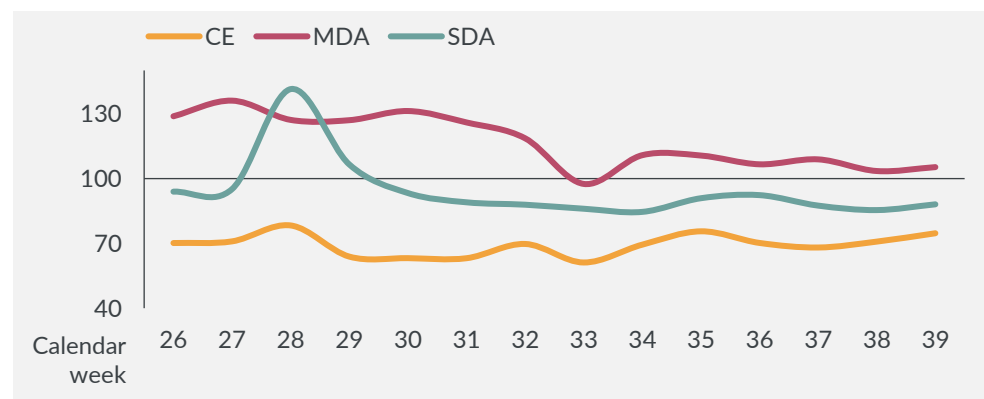
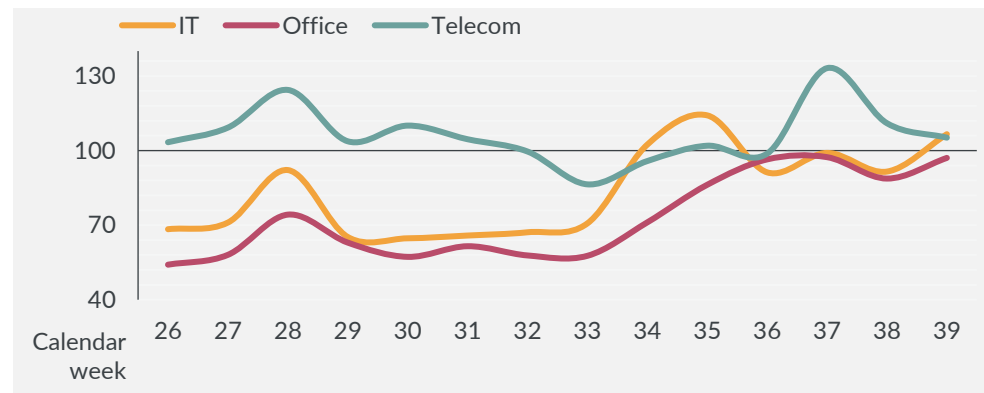
Russia

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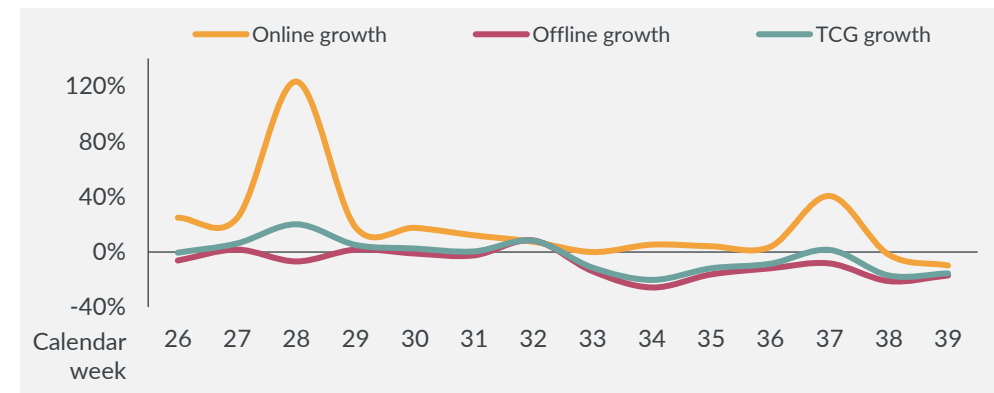
Brazil

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 39 (Sep 26 - Oct 02)

- Online sales fell by 10% and traditional retail dropped by 17%, leading to a deceleration of 15% for the total TCG market.
- IT/Office products ranged from -32% for desk computing to +13% for media tablets. Smartphones accelerated at +9%.
- CE products lost in double-digits with TV sales out in front at -51%. MDA/SDA showed a mixed picture, ranging from +19% for dental care to -13% for food preparation.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 39 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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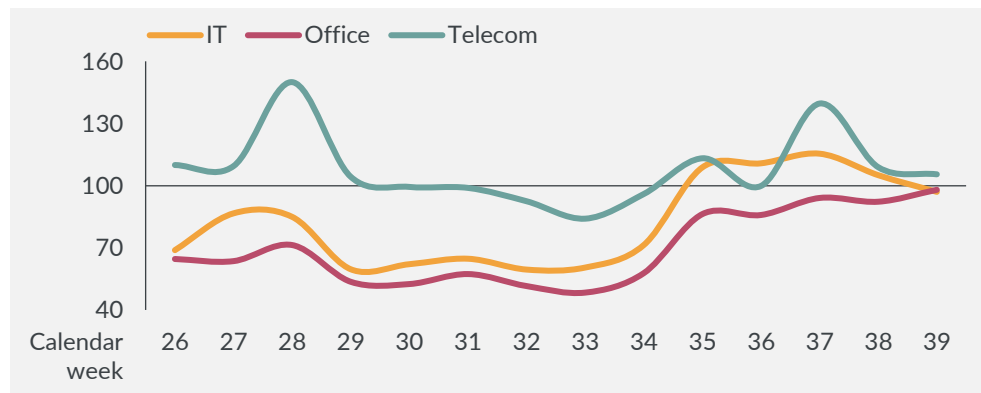
Russia

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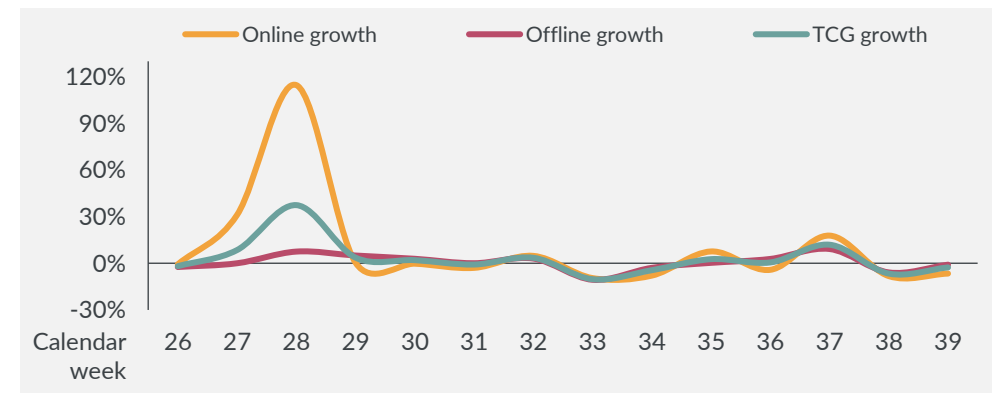
Brazil

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 39 (Sep 26 - Oct 02)

- Traditional retail dropped by 1% and online sales decelerated at -6%, which led to a downswing of the total TCG market of 3%.
- Laser printers were the best performing product group among IT/Office products at +41%. Desk computing slumped at -24%. Smartphones were down 4%. Headsets delivered +20%.
- A mixed performance in MDA and SDA saw rates between -6% for washing machines and +9% for vacuum cleaners. TV sales lagged at -6%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 39 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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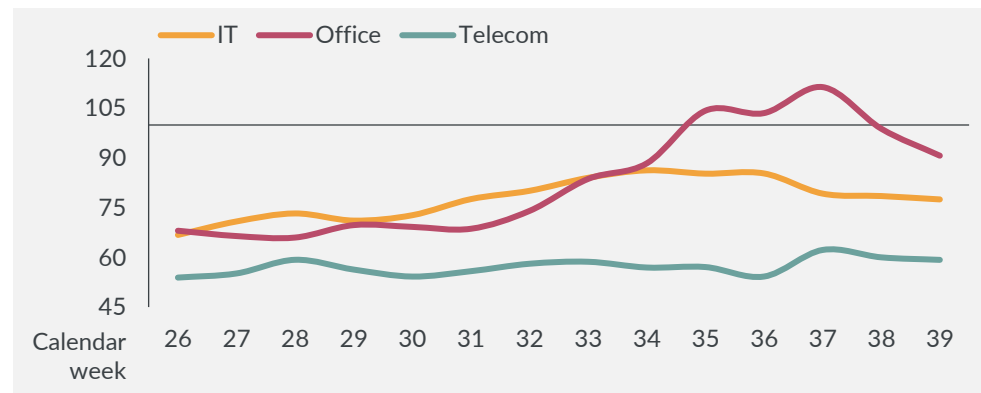
> Russia

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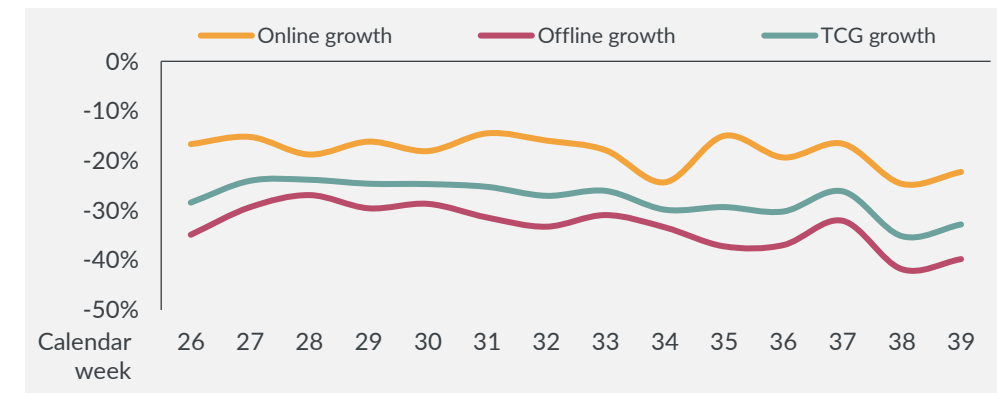
Brazil

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 39 (Sep 26 - Oct 02)

- The total TCG market continued its negative trend at -33%, remaining on a level at more than -30%. This was driven by traditional retail down at -40%. Online sales posted -22%.
- At -50% each, smartphones and media tablets remained the most impacted product groups. Monitors were almost stable at +1%.
- Audio home systems posted a high growth rate of +78% while TVs and soundbars were down 18% and 54% respectively. MDAs and SDAs posted negative trends apart from food preparation at +4%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 39 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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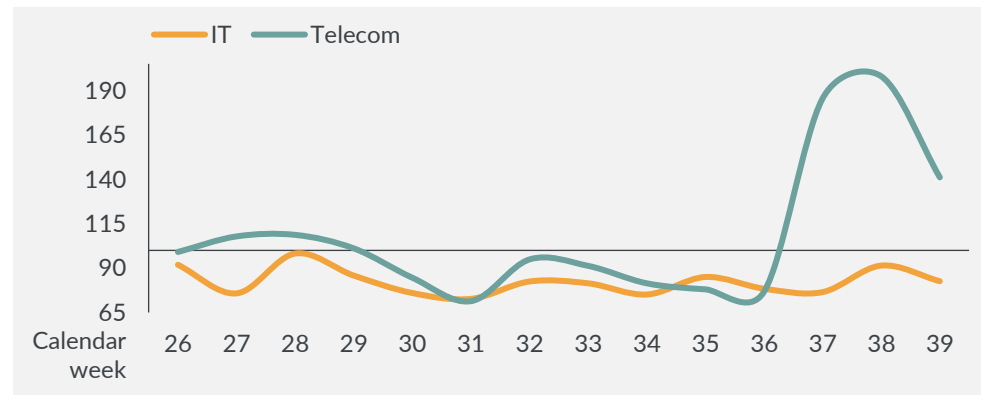
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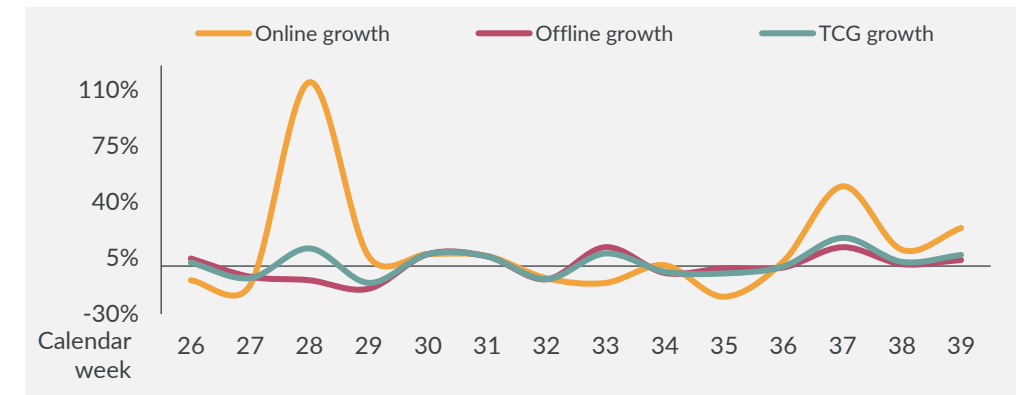
Brazil

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 39 (Sep 26 - Oct 02)

- Both distribution types experienced higher growth rates than in week 38. Traditional retail posted +4% and online sales were up 24%, leading to an increase for total TCG of 7%.
- Headsets and smartphones posted increases of +31% and +3% respectively. Mobile computing was up 9%. Media tablets declined by 31%.
- While MDAs were double-digit positive, SDA and CE products delivered a mixed picture. TV sales were stable at -0.9%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 39 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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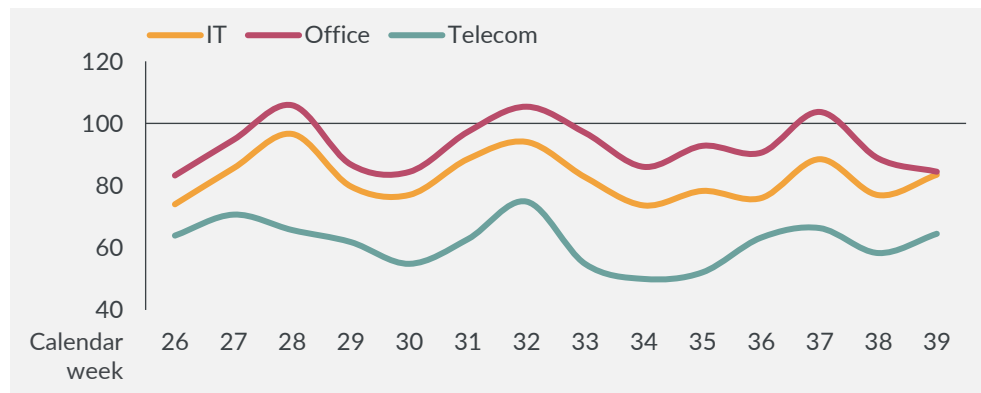
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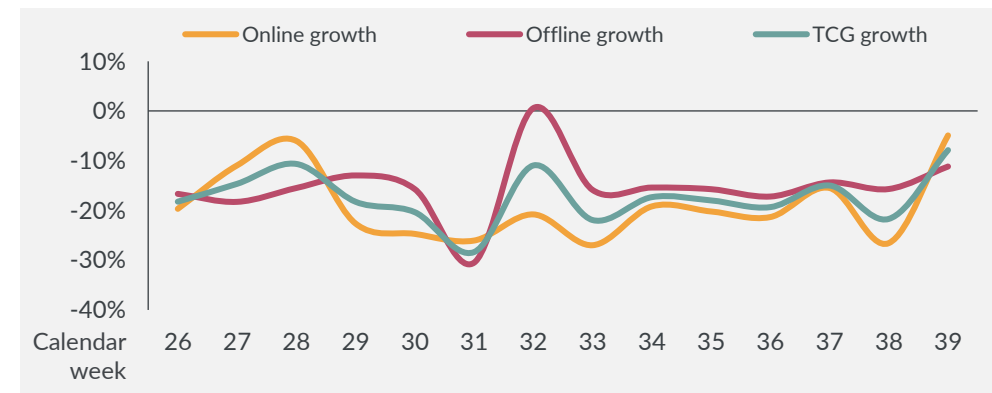
> Brazil

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 39 (Sep 26 - Oct 02)

- Traditional retail (-11%) and online sales (-5%) decreased as in previous weeks but the fall was less pronounced. Total TCG posted a downward trend of -8%.
- Smartphones delivered a strong negative rate (-28%). IT/Office products experienced uplifts from +4% for inkjet printers to +16% for media tablets. Mobile computing declined by 7%.
- Results for MDA/SDA/CE products were positive overall, ranging from -10% for cooling to +53% for TV sales.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 39 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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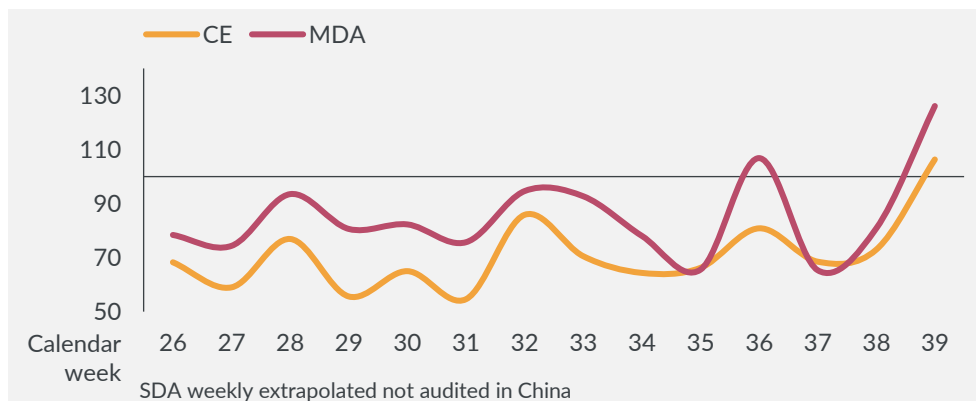
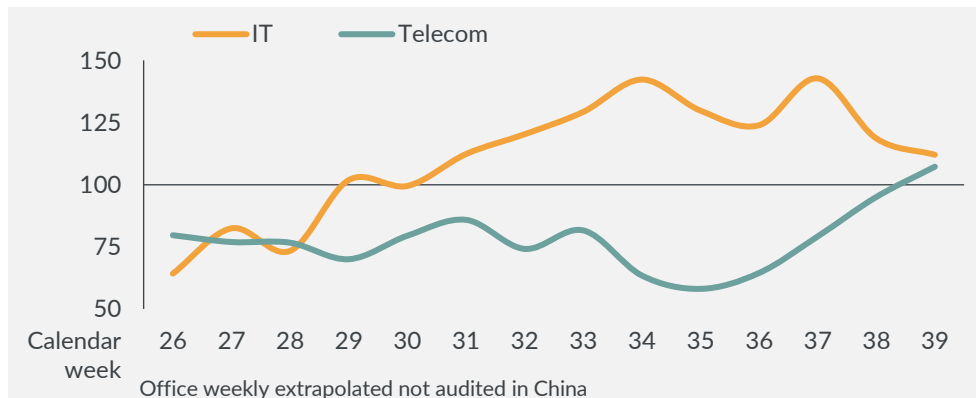
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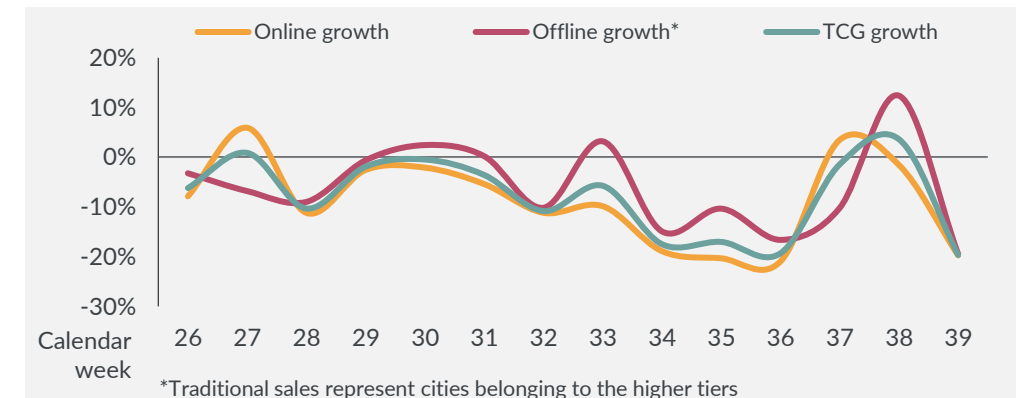
Brazil



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 39 (Sep 26 - Oct 02)

- Both distribution types experienced identical declines of 20%, leading to a decrease for total TCG of 20%.
- Mobile PCs and smartphones delivered a minus of 3% and 17% respectively.
- Week 39 saw strong double-digit drops for TV sales (-34%), washing machines (-31%), and cooling (-26%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 39 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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