



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 130

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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: FMCG and TCG markets: Sustainability as a survival strategy



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> Fact of the week

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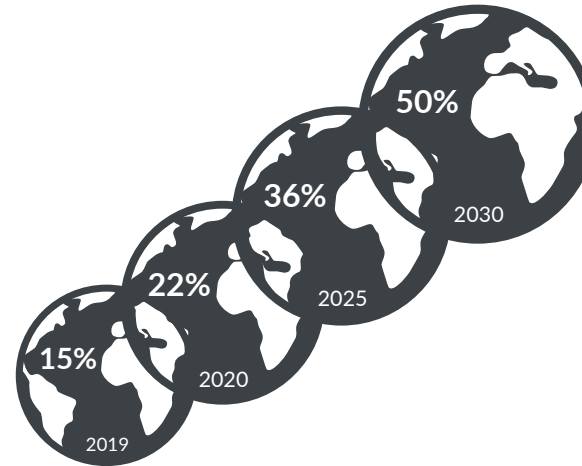
Japan

Brazil

China

73%
Believe

say it is important
that companies take
environmentally
friendly actions



By 2030, 50% of
global population
will be eco-active

Eco-actives
revenue
potential 2030

FMCG >\$1000 billion

TCG: >\$700 billion



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



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Fact of the week

> Germany

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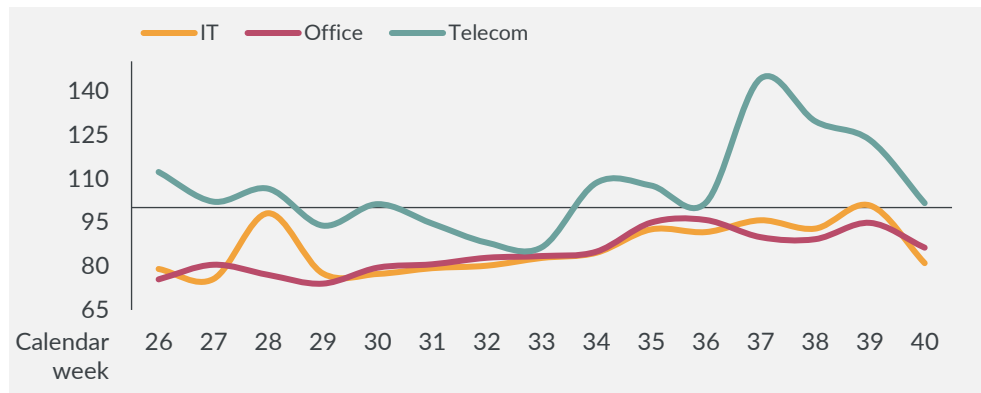
Japan

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China

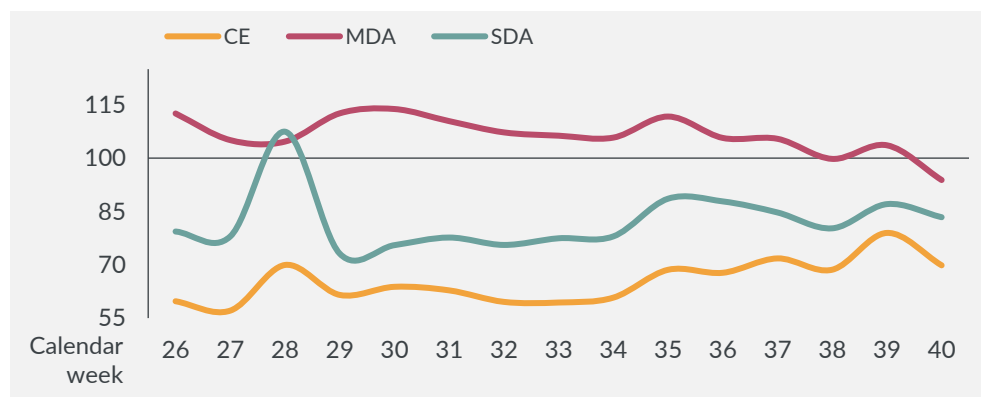
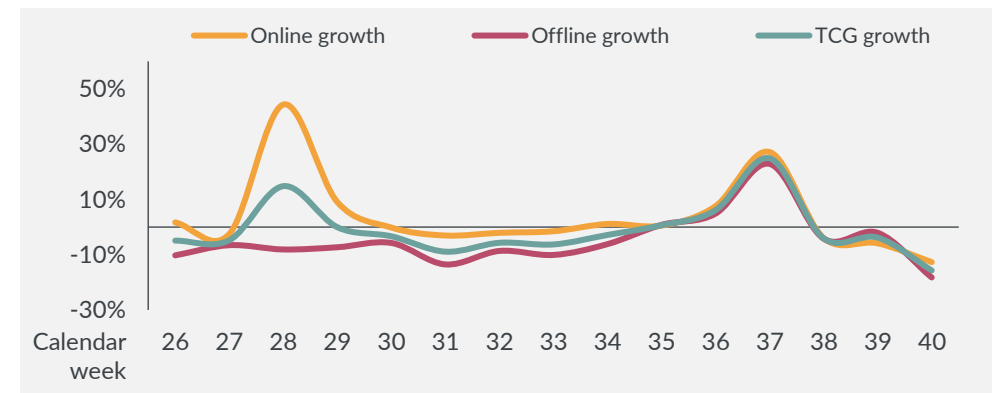
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 40 (Oct 03 - Oct 09)

- Online sales experienced a minus of 13% vs week 40 in 2021. Traditional retail lost even more at -18% and dragged total TCG to a minus of 16%.
- IT/Office and telecom products decelerated in double digits, ranging from -10 for inkjet printers to -23% for desk computing. Smartphones were down by 14%.
- Except for cooling at -8% and food preparation at -7%, there were double-digit negative trends for all other MDA/SDA/CE products.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 40 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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Germany

> Great Britain

France

Italy

Spain

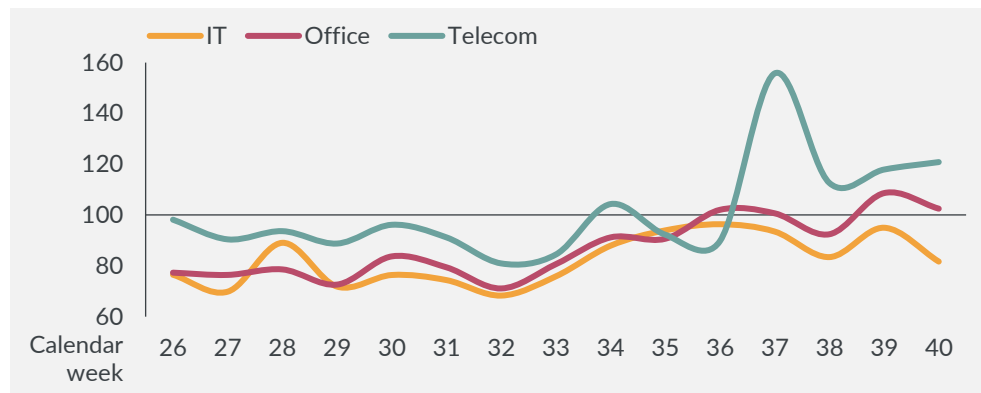
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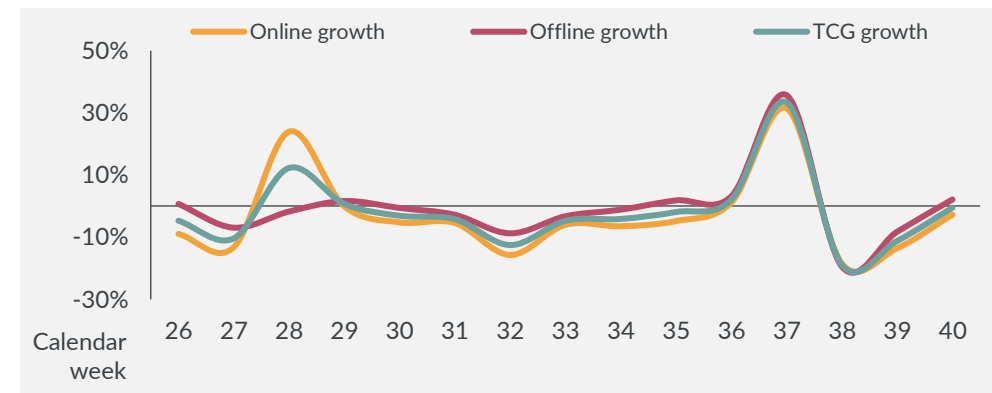
Brazil

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 40 (Oct 03 - Oct 09)

- Slight losses for online sales (-3%) and slight gains for traditional retail (+2%) delivered a nearly stable total TCG market (-1%).
- IT/Office products posted negative trends except for laser printers at +17%. Smartphones accelerated by 9% and headsets delivered +16%.
- Within MDA/SDA/CE products, audio home systems were the exception at +8%. All other product groups were stable (vacuum cleaners, hot beverage makers, dental care) or negative.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 40 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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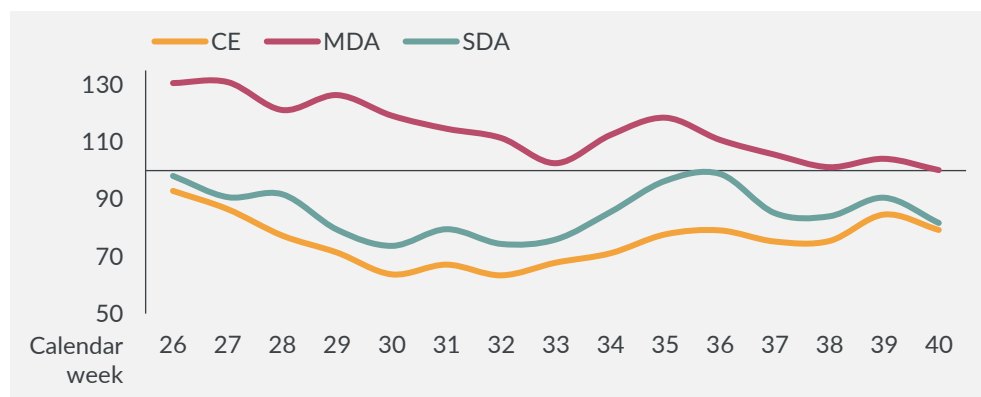
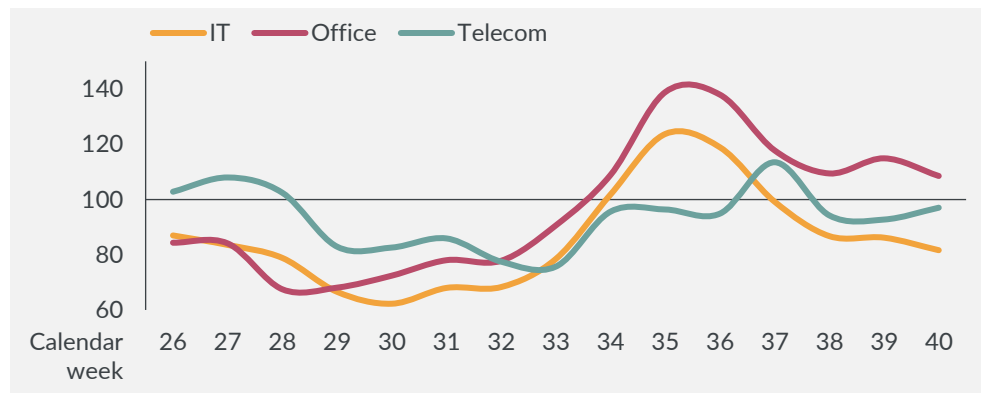
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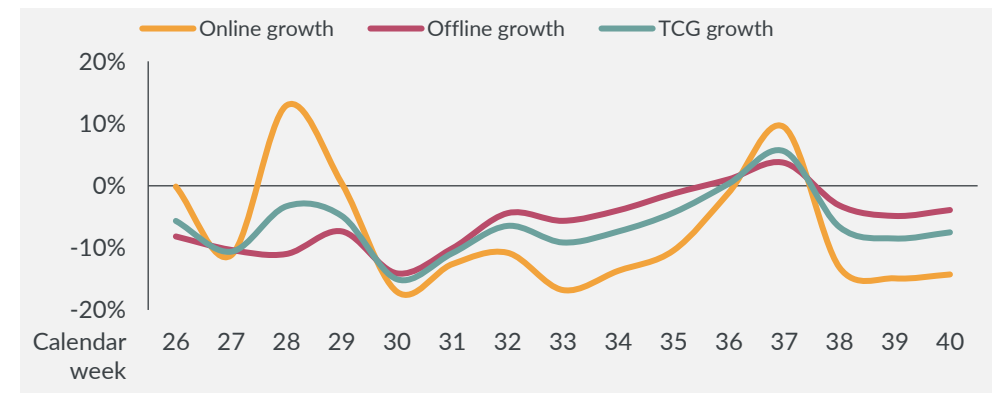
Brazil

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 40 (Oct 03 - Oct 09)

- Online sales delivered -14% (-15% the previous week) and traditional retail was down -4% (-5% the previous week), resulting in a downswing of the total TCG market of 8%.
- IT products were negative, ranging from -12% for monitors and keyboards to -30% for desk computing. Smartphones lagged at -7%. Headsets accelerated at +16%.
- All MDA/SDA/CE products experienced a negative development with air treatment out in front at -32%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 40 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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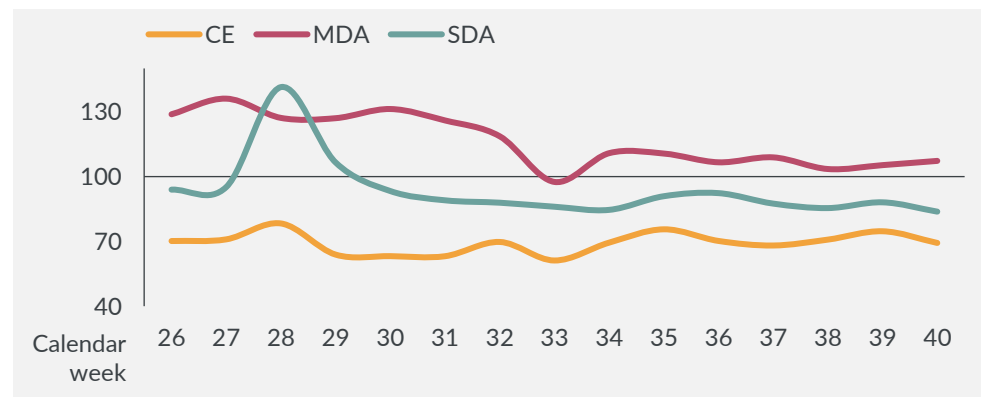
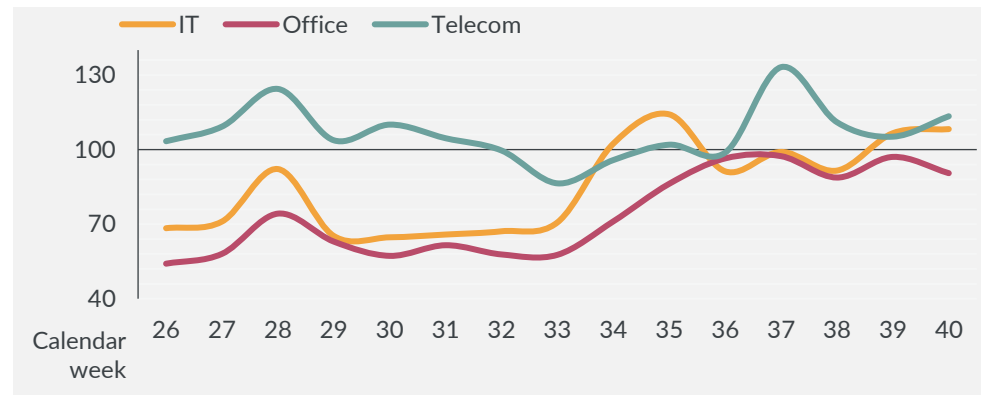
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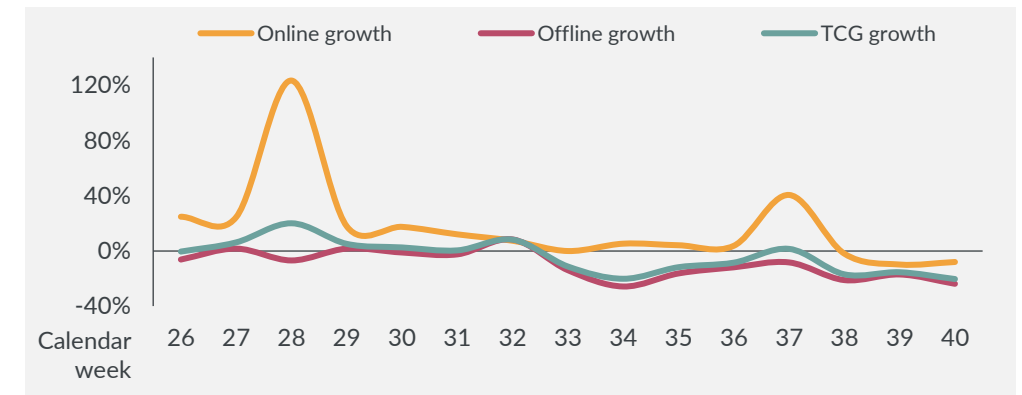
Brazil

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 40 (Oct 03 - Oct 09)

- Online sales fell by 8% and traditional retail dropped by 24%, leading to a deceleration of 20% for the total TCG market.
- IT/Office products ranged from -29% for desk computing to +10% for media tablets. Smartphones accelerated at +8%.
- The product group hit the most in week 40 was TVs at -61% (base effect of last year's government subsidy due to switch-offs). MDA/SDA showed a mixed picture, ranging from +6% for cooling and shavers to -41% for air treatment.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 40 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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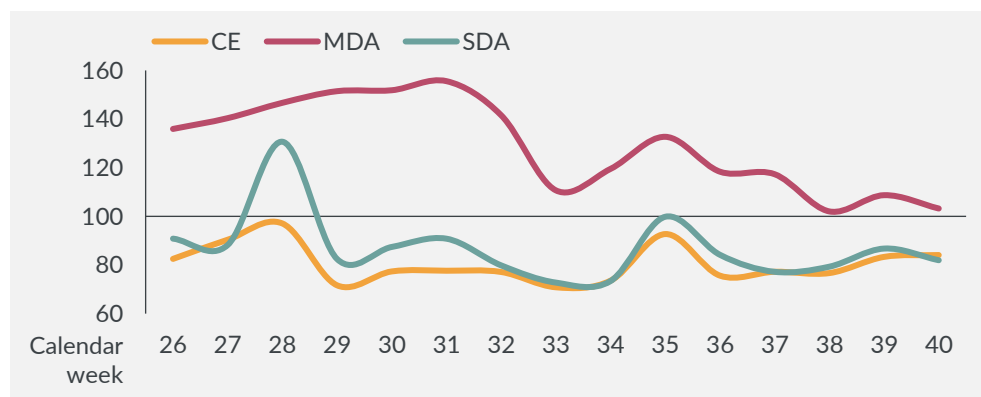
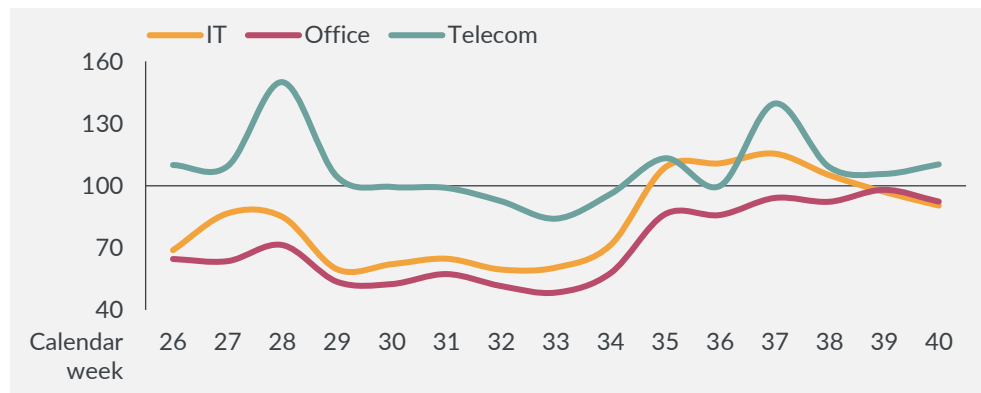
Russia

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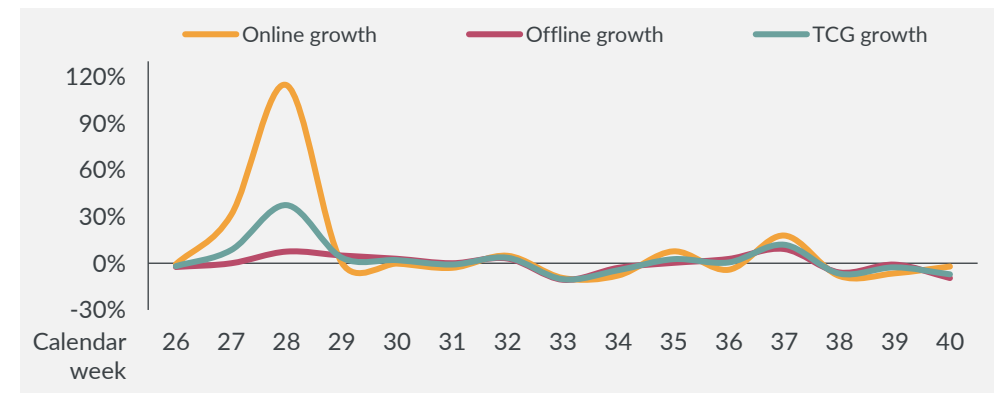
Brazil

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 40 (Oct 03 - Oct 09)

- Traditional retail dropped by 10% and online sales decelerated at -2%, which led to a downswing of the total TCG market of 7%.
- Laser printers were the best performing product group among IT/Office products at +26%. Desk computing slumped at -24%. Smartphones were down 9%. Headsets delivered +18%.
- An overall negative performance in MDA and SDA saw rates between -5% for washing machines and -0.4% for hot beverage makers. TV sales slumped at -10%. Soundbars were up 2%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 40 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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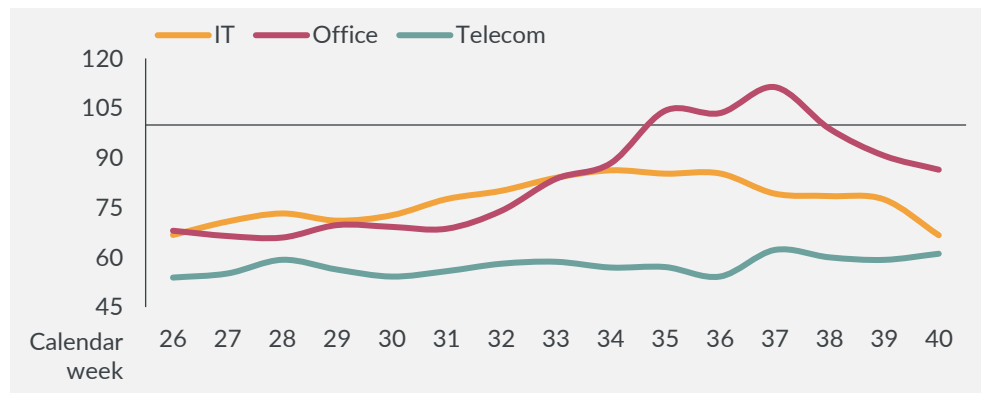
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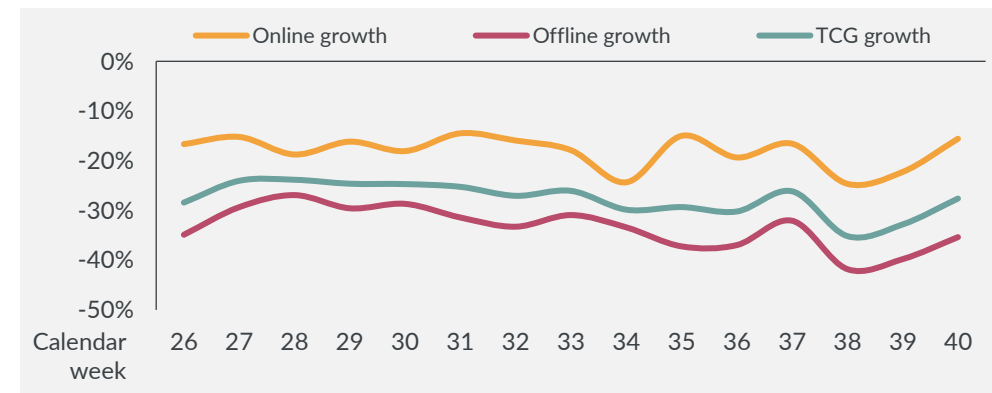
Brazil

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 40 (Oct 03 - Oct 09)

- A slightly less negative result of online sales (from -22% in week 39 to -16% in week 40) and traditional retail (from -40% to -35%) led to -28% for the total TCG market.
- At -57%, media tablets remained one of the most impacted product groups. Monitors experienced +8%.
- Audio home systems posted a high growth rate of +84% while soundbars were down 54%. MDAs increased by +1%. SDAs delivered negative trends apart from food preparation at +1%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 40 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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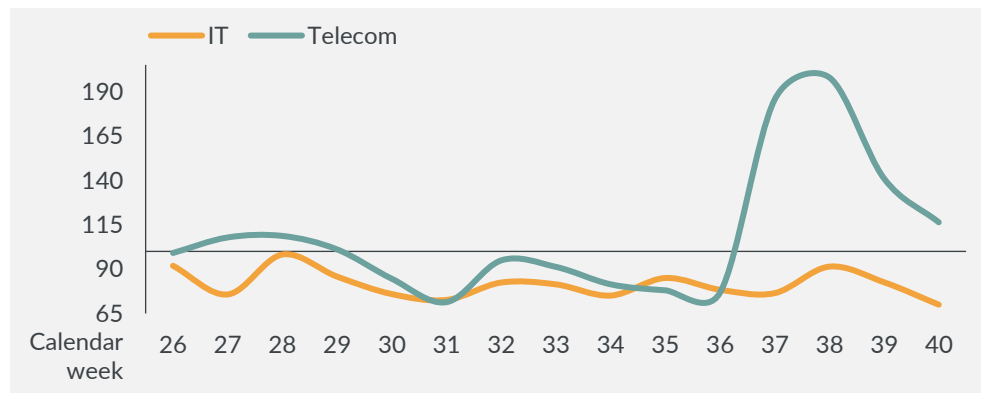
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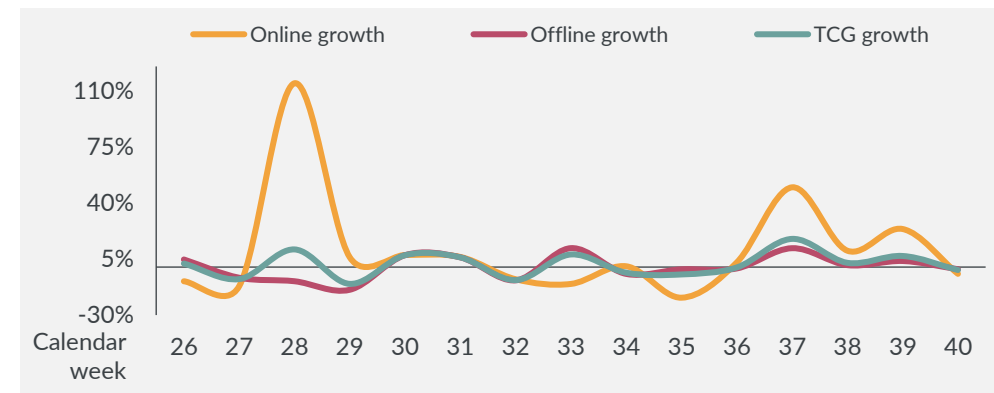
Brazil

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 40 (Oct 03 - Oct 09)

- Both distribution types experienced drops in week 40. Traditional retail posted -1% and online sales were down -4%, leading to a decrease for total TCG of -2%.
- Headsets and smartphones posted increases of +13% and +3% respectively. Mobile computing was up 4%. Media tablets declined by 45%.
- While CE products were negative throughout, MDAs and SDAs posted a mixed picture.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 40 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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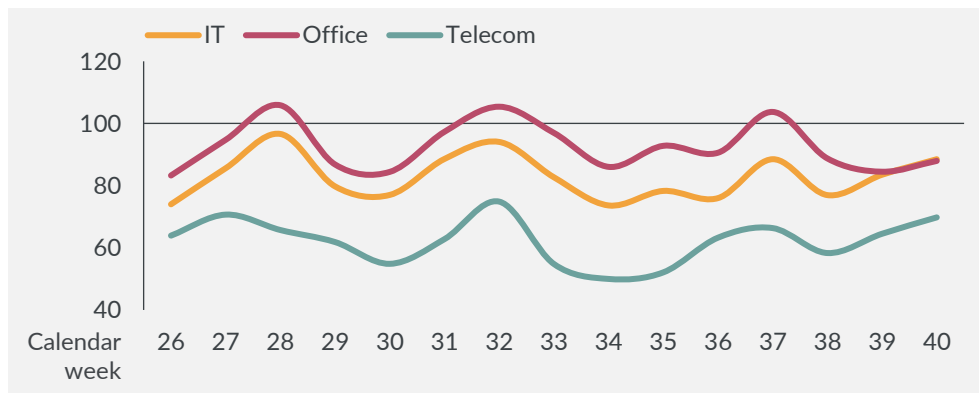
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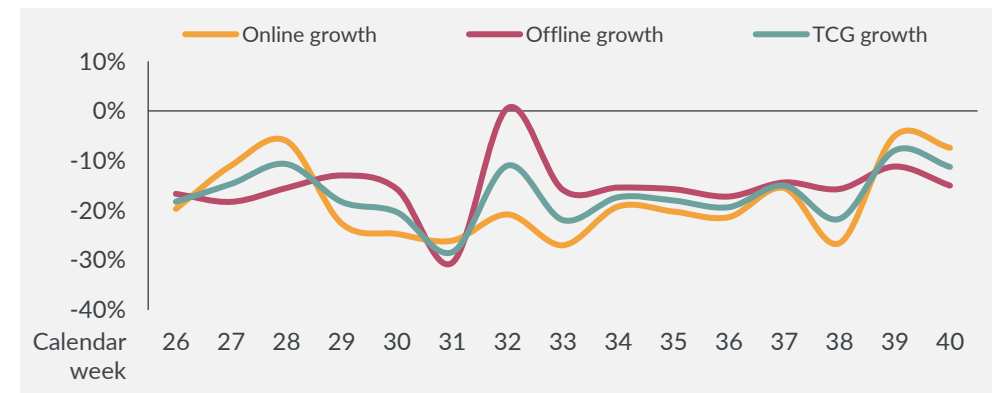
> Brazil

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 40 (Oct 03 - Oct 09)

- Traditional retail (-15%) and online sales (-7%) decreased as in previous weeks but the fall was less pronounced. Total TCG posted a downward trend of -11%.
- Smartphones delivered a strong negative rate (-31%). IT/Office products saw a mixed picture ranging from -13% for laser printers to +11% for desk computing.
- Results for MDA/SDA/CE products were positive overall, ranging from -9% for cooling to +41% 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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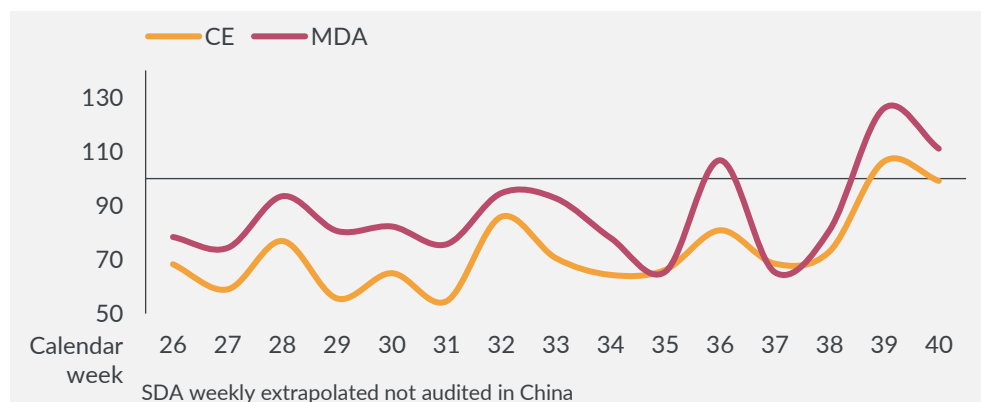
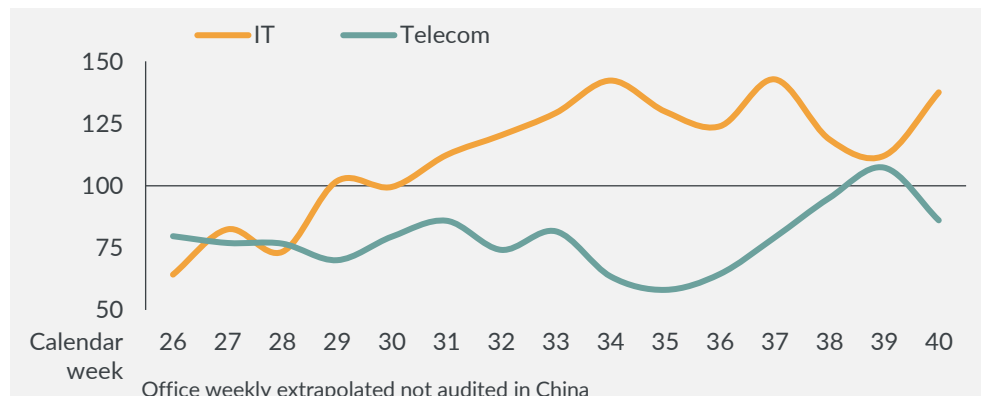
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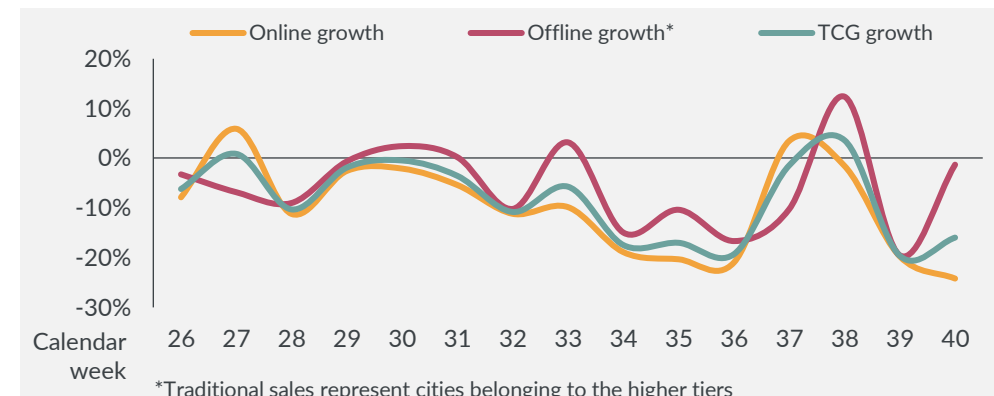
Brazil

> 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 40 (Oct 03 - Oct 09)

- While online sales posted a sharp drop of -24%, traditional sales were nearly stable at -1%. Total TCG experienced a downswing of 16%.
- Mobile PCs and smartphones delivered a minus of 4% and 18% respectively.
- Week 40 saw strong double-digit drops for TV sales (-16%), washing machines (-25%), and cooling (-15%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 40 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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