



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 133

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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: Rethink pricing and promotion to reflect new market dynamics



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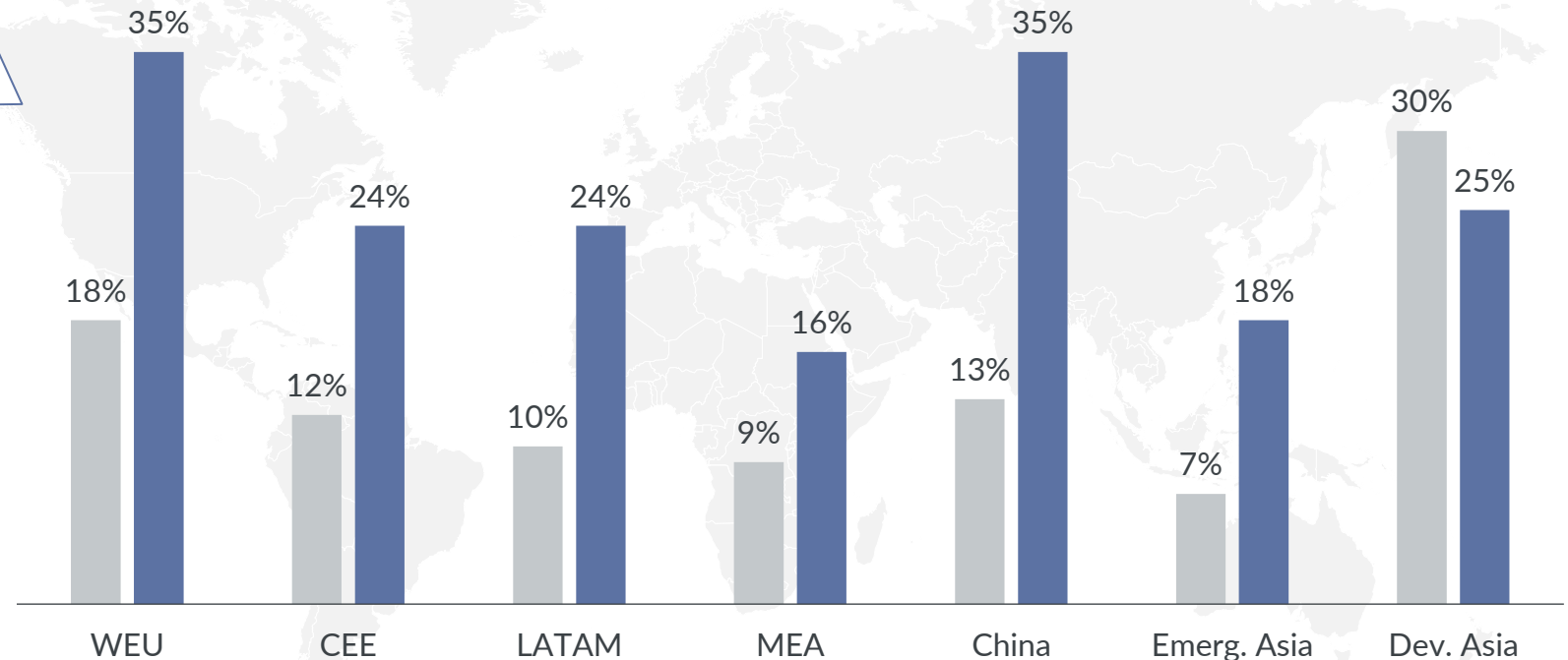
27%

+14 pts vs. 2021

Panel TVs unit share with
price cut more than 10%

Inventory clearance and decelerating
demand led to increased price cuts

■ H1 2021
■ H1 2022



Source: GfK Market Intelligence: Sales Tracking, International Coverage (excluding North America)

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



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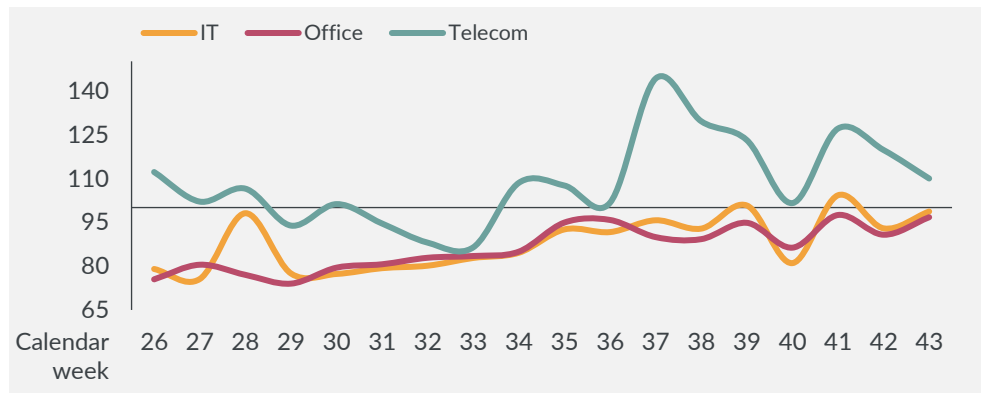
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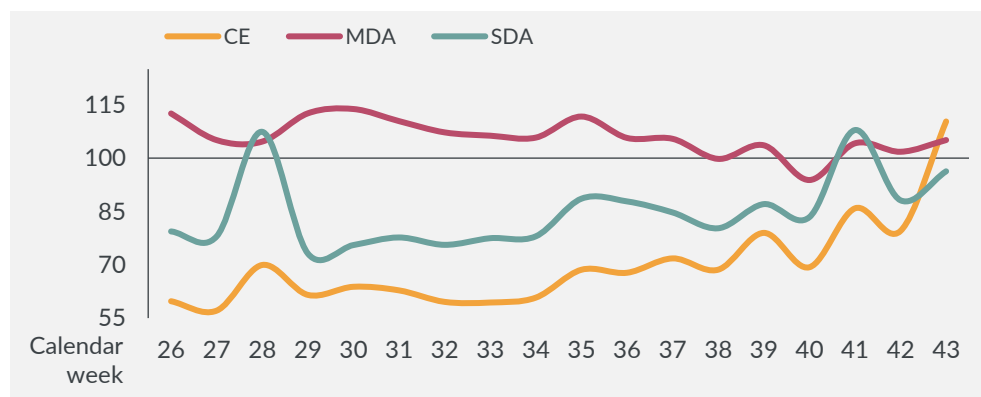
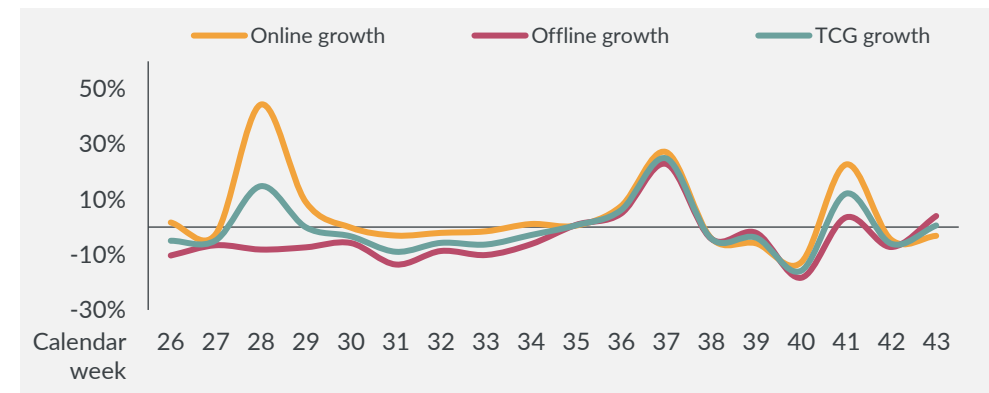
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 43 (Oct 24 - Oct 30)

- Online sales experienced a minus of 3%, but at +4%, traditional retail compensated, resulting in a slight plus of 1% for total TCG.
- Media tablets at +33% were the best performing category in week 43. Desk computing brought up the rear at -25%. Smartphones were stable at +0.6%.
- The trends for MDA/SDA/CE products ranged between +15% for hot beverage makers and soundbars to -19% for audio home systems. TV sales recorded +4%. Cooling was flat.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 43 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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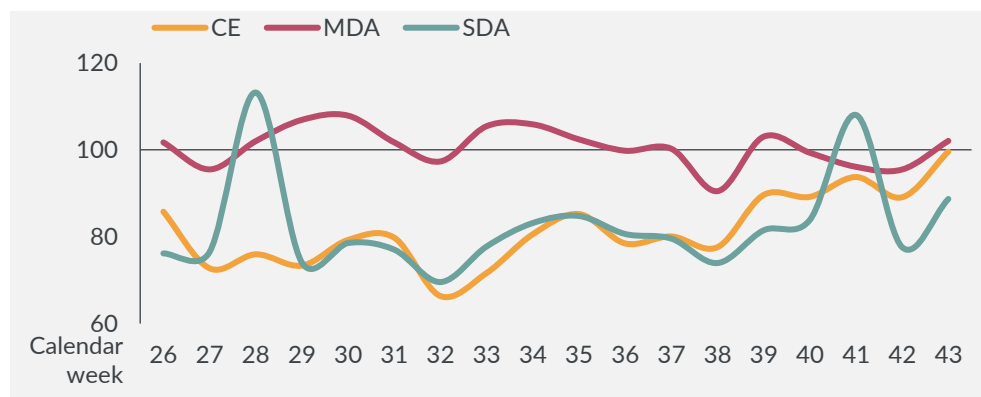
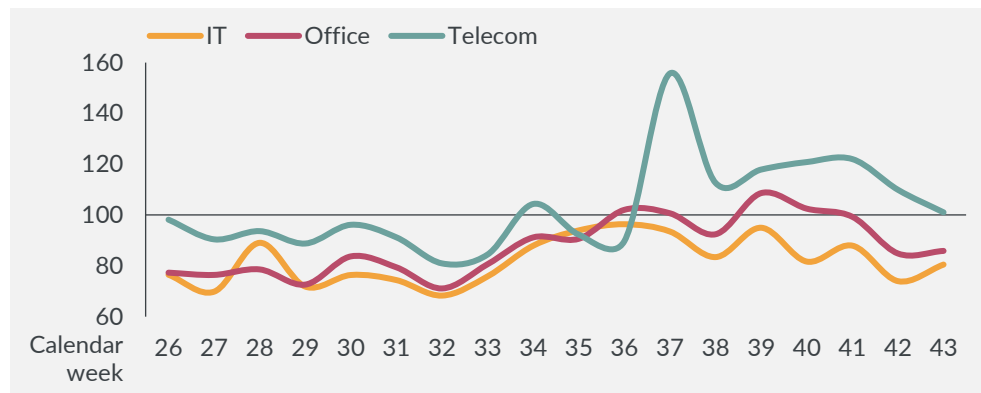
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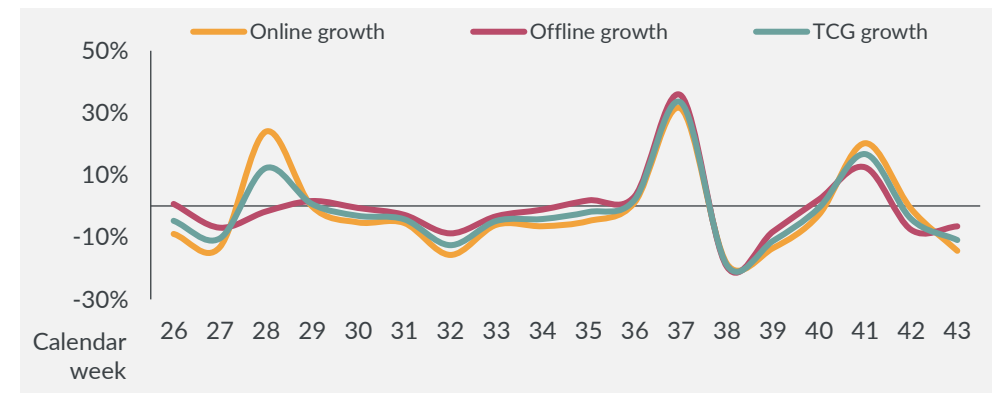
Brazil

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 43 (Oct 24 - Oct 30)

- Online sales delivered -14% and traditional retail fell -7%, resulting in a downswing of the total TCG market of -11%.
- Most IT products posted double-digit negative trends, with desktop computing and mobile computing in the lead at -29% and -27% respectively. Smartphones posted -11%.
- MDA/SDA/CE products delivered mostly negative trends, ranging from -18% for audio home systems to -4% for cooling. Washing machines posted +2% and vacuum cleaners were up +4%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 43 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): 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

> France

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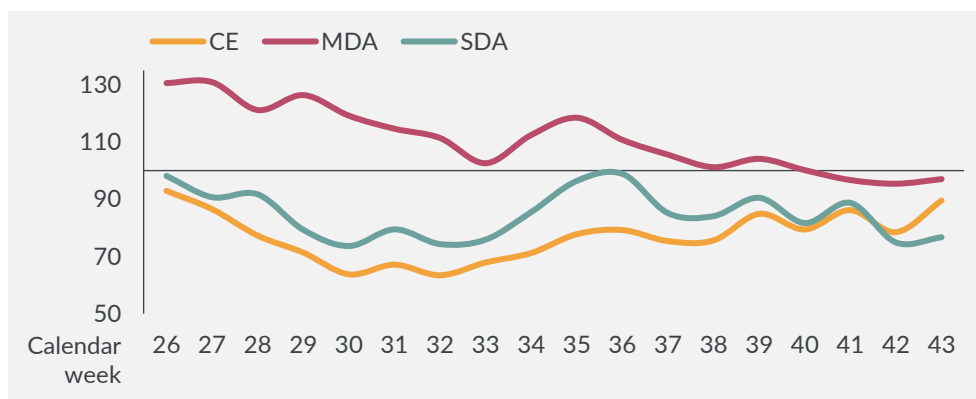
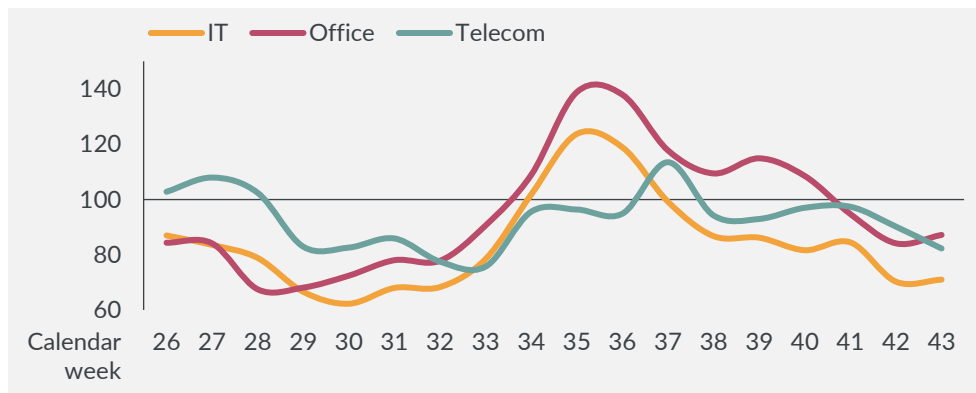
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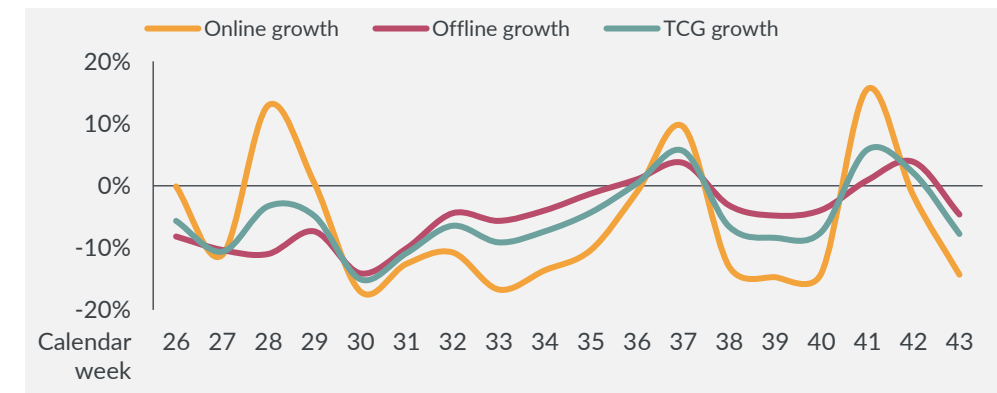
Brazil

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 43 (Oct 24 - Oct 30)

- Online sales delivered -14% (-2% the previous week) and traditional retail was down -5% (+4% the previous week), resulting in a downswing of the total TCG market of 8%.
- IT products posted a mixed picture, ranging from -37% for desk computing to +3% for keyboards and mice. Smartphones slumped at -18%.
- Audio home systems saw a remarkable decline of -25%. Food preparation (-16%) and hot beverage makers (-10%) also lost.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 43 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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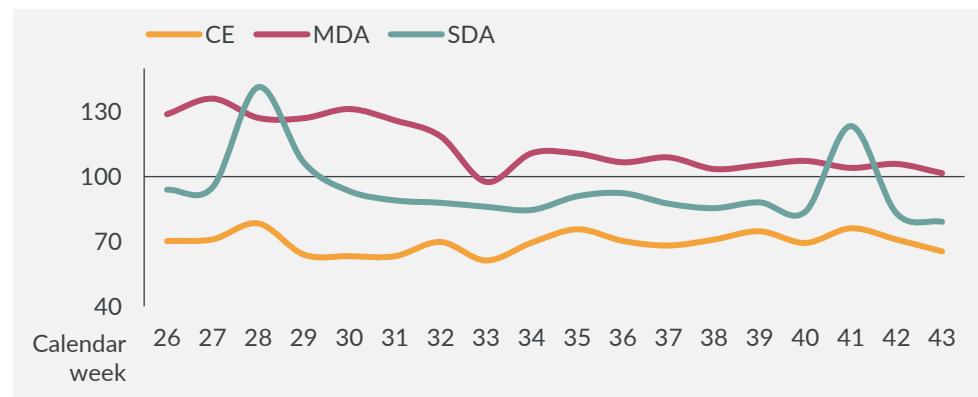
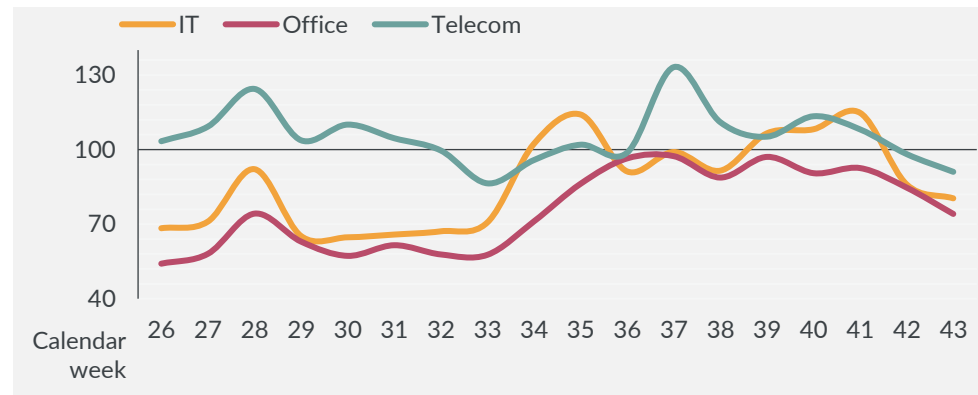
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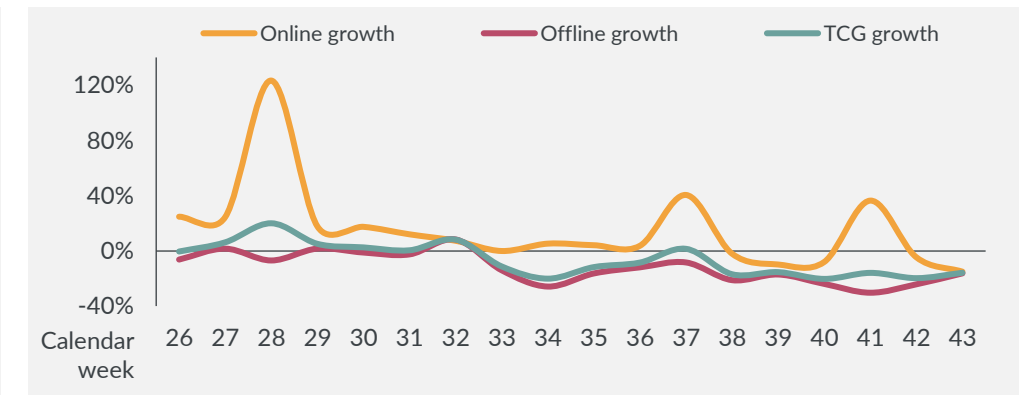
Brazil

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 43 (Oct 24 - Oct 30)

- Deceleration of traditional retail (-16%) dragged the total TCG market down by -16%. Online sales added to it by delivering -15%.
- IT/Office products ranged from -22% for inkjet printers to +22% for media tablets. Smartphones accelerated at +2%.
- CE products lost in double-digits with TV sales out in front at -50%. MDA/SDA posted a mixed picture, ranging from -14% for air treatment to +14% for cooling.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 43 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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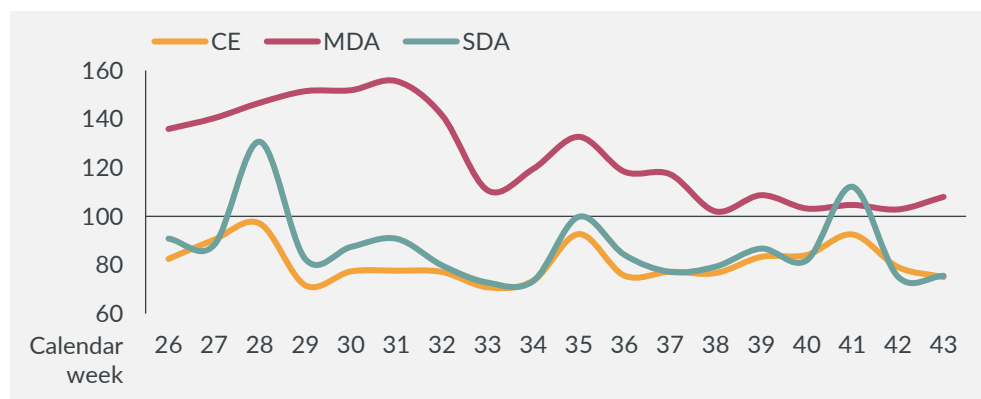
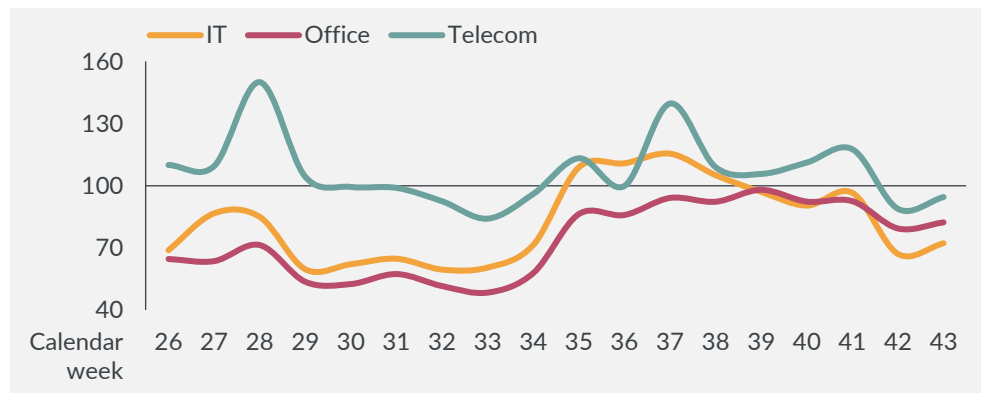
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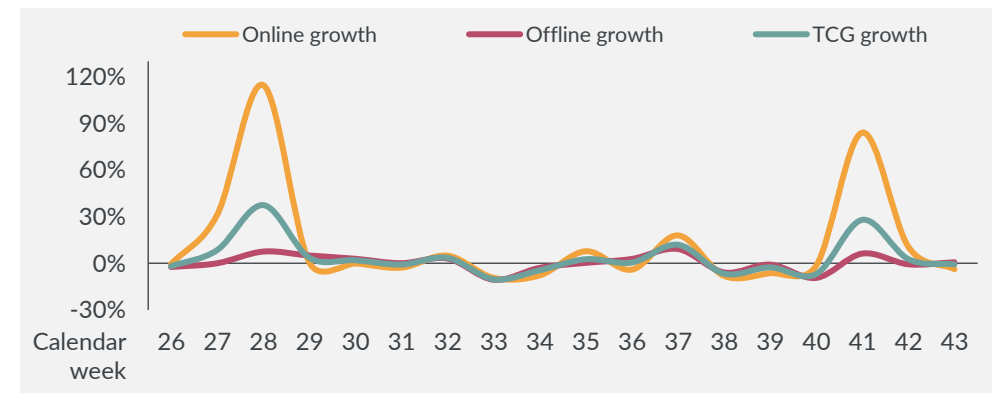
Brazil

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 43 (Oct 24 - Oct 30)

- Traditional retail experienced a slight plus of 1% vs week 43 in 2021, but this failed to compensate for the losses of online sales (-4%) and left the total TCG at a small minus of 1%.
- Laser printers were the best performing product group among IT/Office products at +22%. Desk computing slumped at -24%. Smartphones were up 12%. Headsets delivered +14%.
- While MDAs were positive at 8%, SDA products mainly posted negative trends except for vacuum cleaners at +12%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 43 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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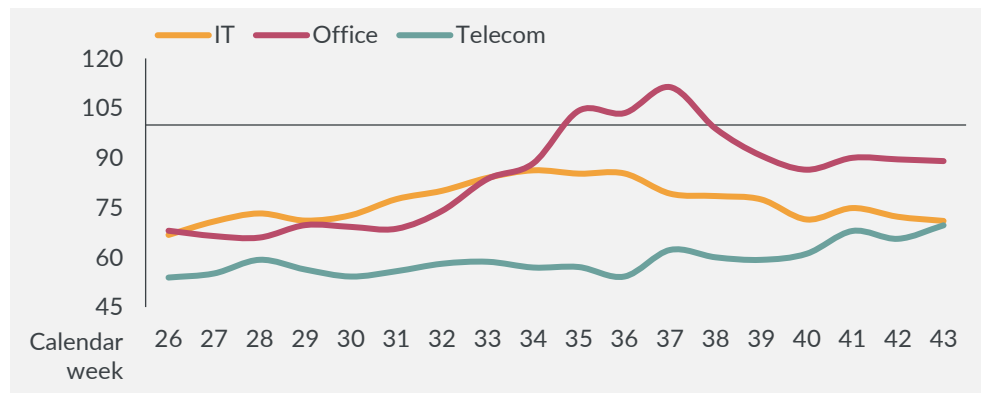
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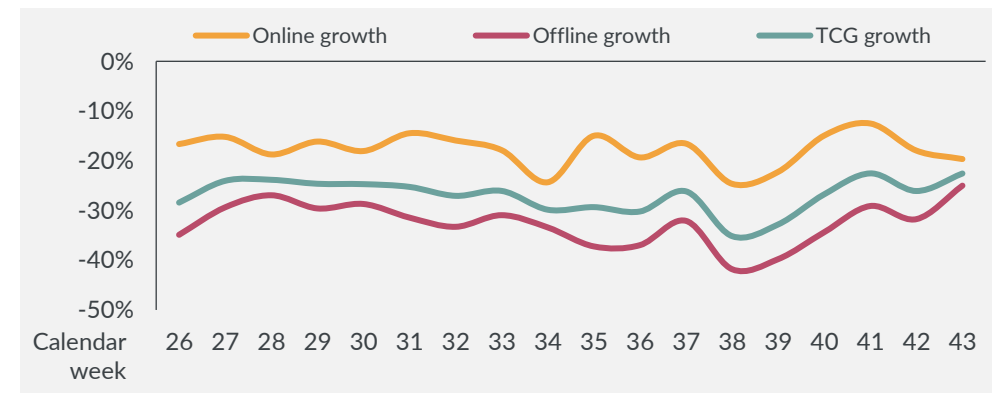
Brazil

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 43 (Oct 24 - Oct 30)

- The total TCG market continued its negative trend at -23%. This was driven by traditional retail down at -25%. Online sales posted -20%.
- At -52% each, media tablets were the most impacted product group. Monitors accelerated at +5% and keyboards were up 3%.
- Audio home systems posted an extraordinary growth rate of +105% while TVs and soundbars were down 23% and 46% respectively. MDAs and SDAs delivered results of between -14% for air treatment and +8% for food preparation. Washing machines were flat.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 43 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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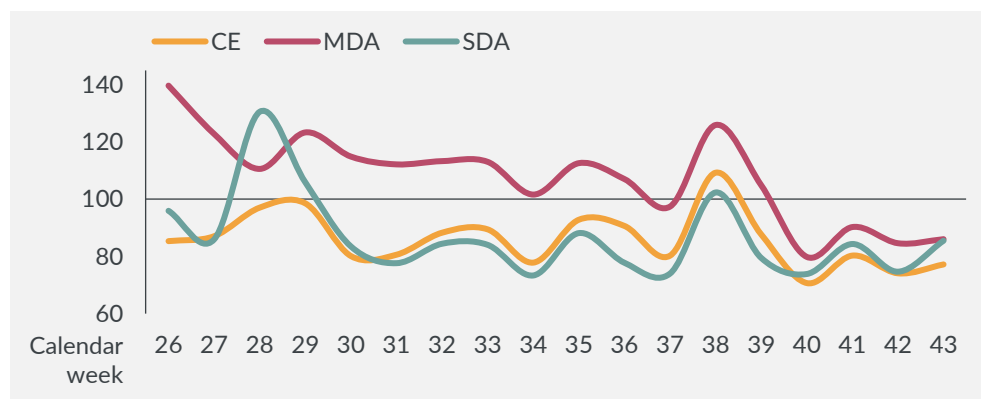
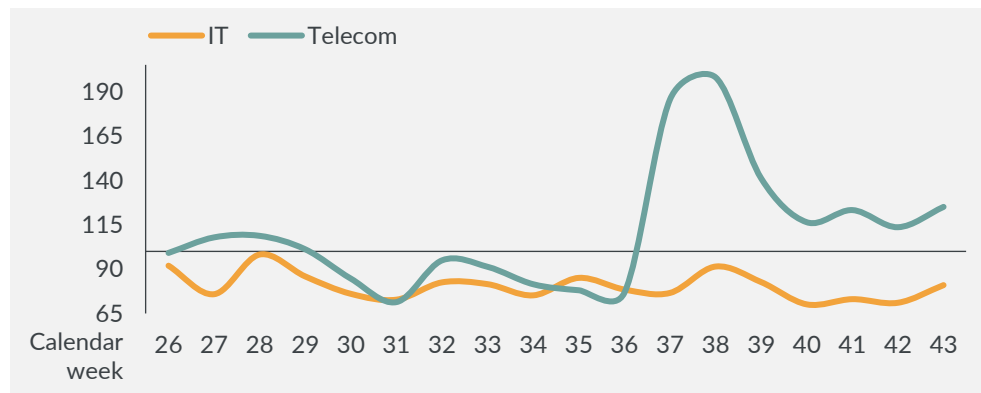
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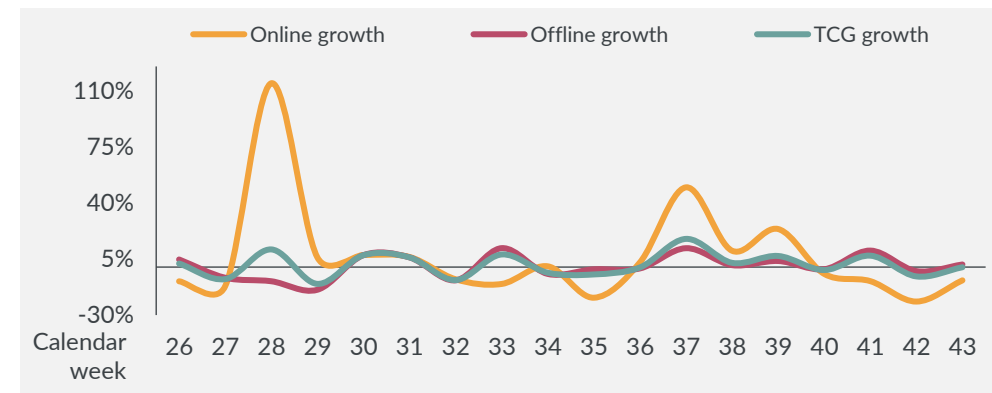
Brazil

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 43 (Oct 24 - Oct 30)

- Both distribution types recovered. Online sales were less negative than the previous week, posting -8% in week 43 vs -22% in week 42. Online sales gained +2%, resulting in a flat total TCG market.
- Smartphones posted an increase of +18%. Headsets were down -4%. While mobile computing slumped at -13%, media tablets recovered to a slight +1%.
- MDA/SDA/CE products ranged from -30% for air treatment to +17% for soundbars. TV sales decelerated by 8%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 43 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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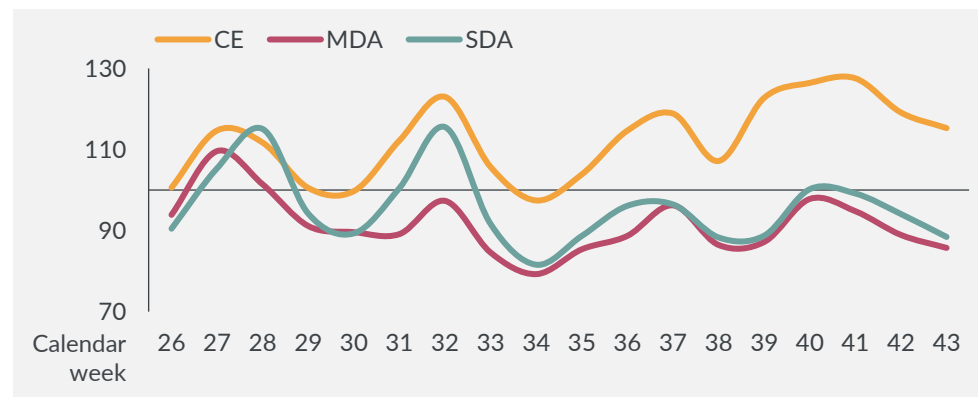
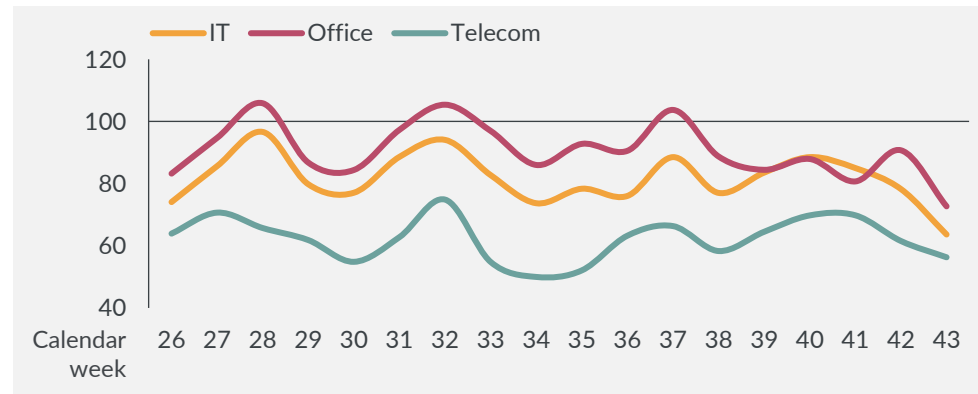
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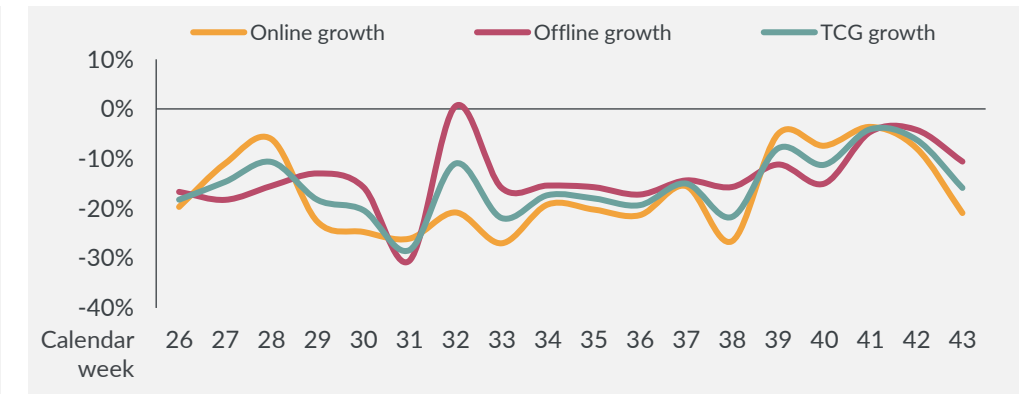
> Brazil

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 42 (Oct 17 - Oct 23)

- Both distribution types fell. Online sales dropped 21% and traditional retail posted -11%, leading to a decrease for total TCG of 16%.
- IT/Office and telecom products decelerated throughout, in double digits for most categories. Desktop computing was hit least at -4%.
- TVs were the best-performing product group at +29%. Most MDAs and SDAs delivered negative trends except for shavers at +12%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 43 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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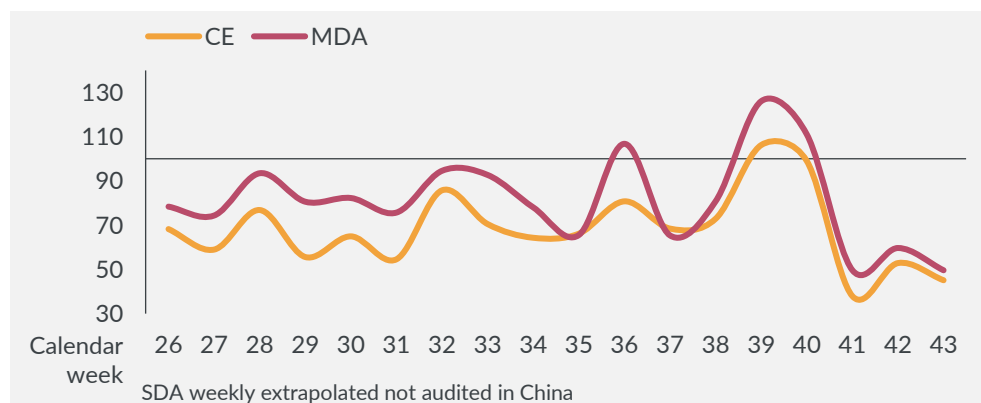
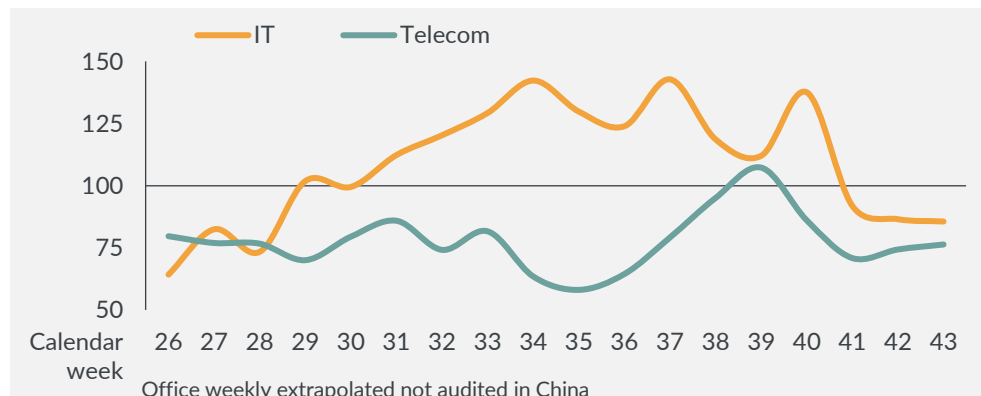
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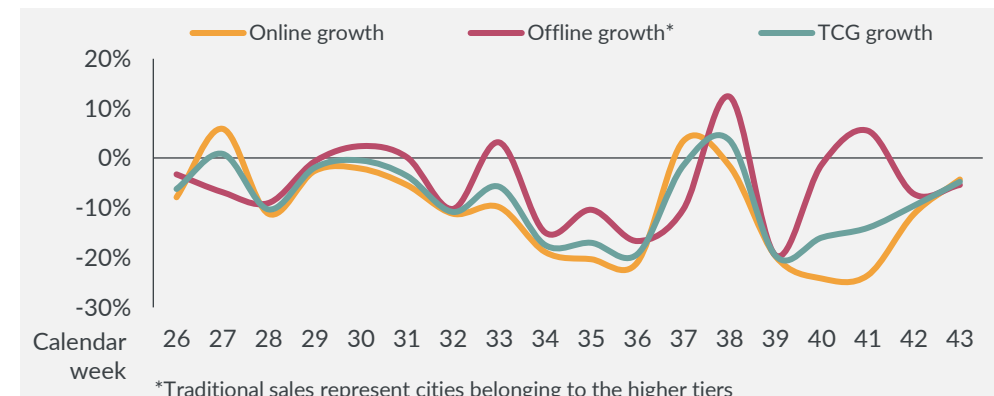
Brazil

> 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 43 (Oct 24 - Oct 30)

- Both distribution types experienced nearly identical declines of -5% for traditional retail and -4% for online sales, leading to a decrease for total TCG of 5%.
- Mobile PCs and smartphones delivered upticks of 17% and 7% respectively.
- Week 43 saw strong double-digit drops for TV sales (-57%), washing machines (-35%), and cooling (-23%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 43 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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