



Growth
from
Knowledge

State of Consumer Technology and Durables Sales Tracker

Weekly trends and insights for
the tech and durables market

EDITION 134

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> About gfknewron

Fact of the week

Germany

Great Britain

France

Italy

Spain

Russia

Japan

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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: Consumer confidence is in decline across the globe



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> Fact of the week

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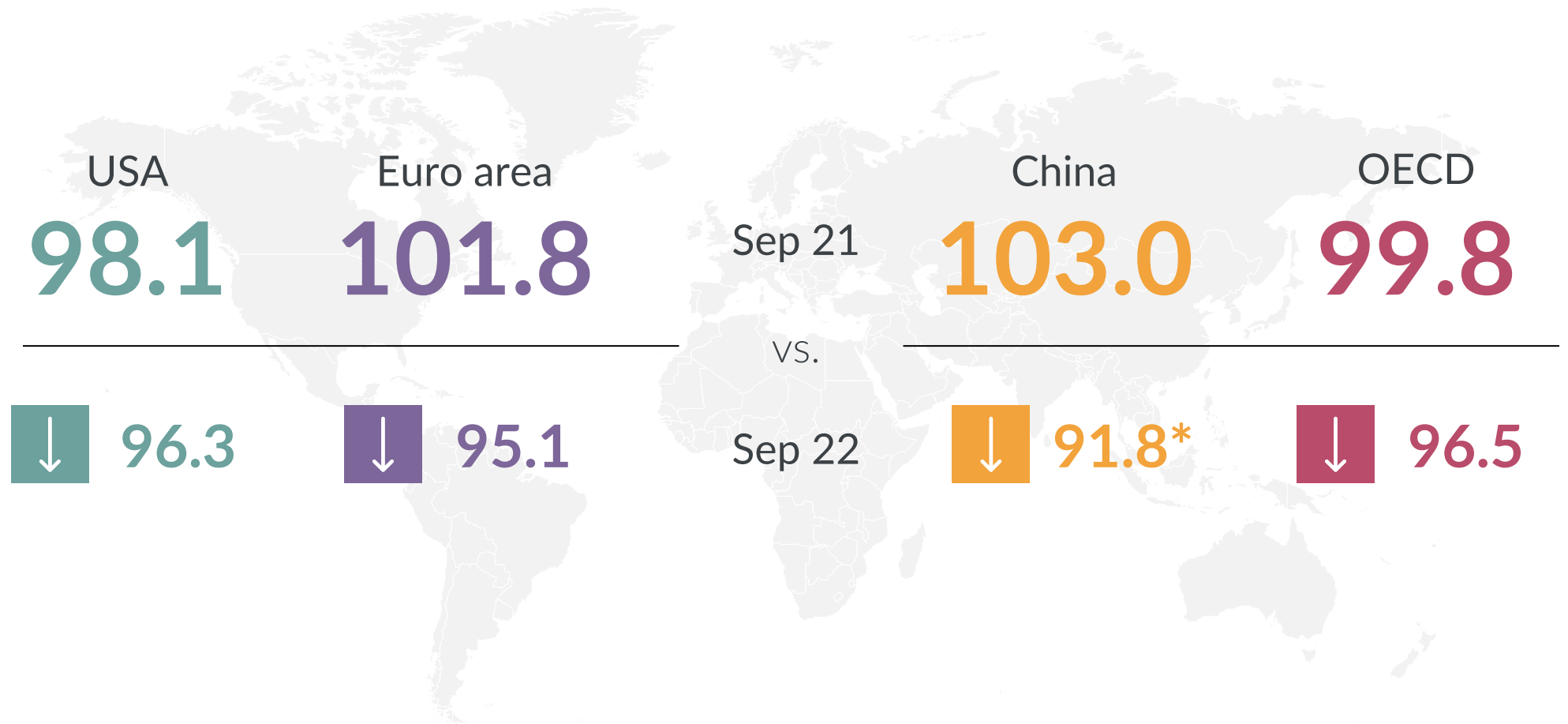
Spain

Russia

Japan

Brazil

China



Source: OECD; Consumer Confidence: Amplitude adjusted, Long-term average = 100, Jan 2008 – Sep 2022; *China – available August 2022 data

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



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Fact of the week

> Germany

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Russia

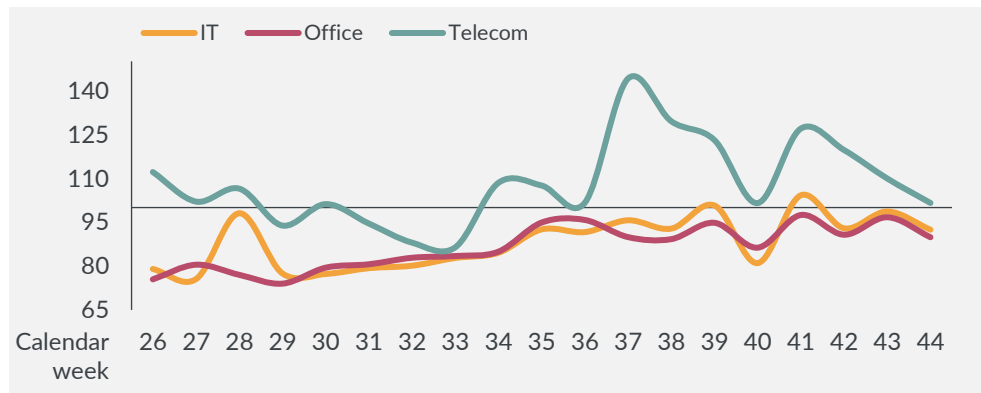
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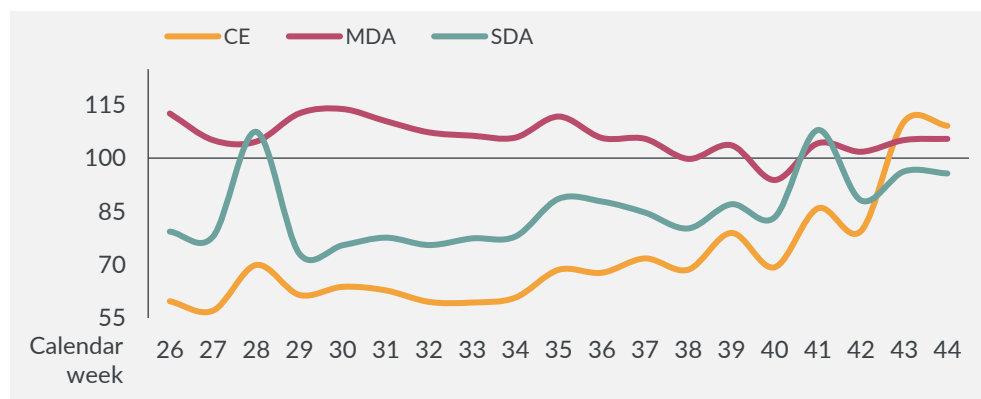
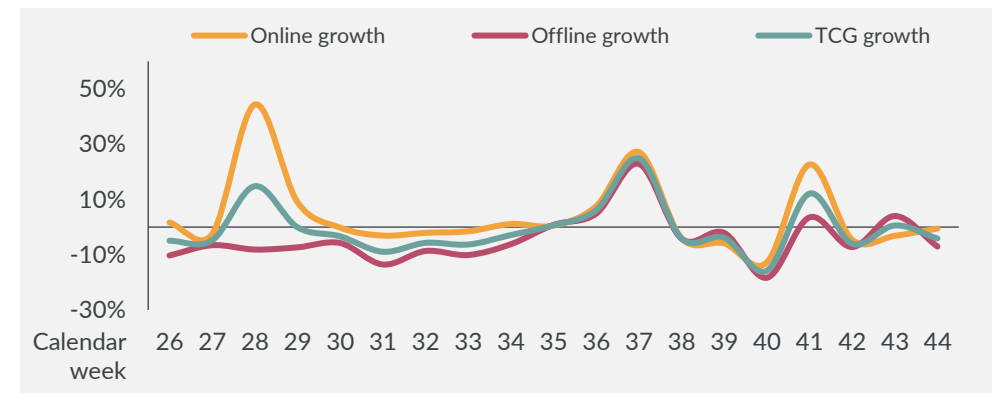
Please note: Below lines depict a sales index vs. an average 2021 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs. same week 2021).

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 44 (Oct 31 - Nov 06)

- Traditional retail experienced a minus of 7% vs week 44 in 2021. Online sales at -1% failed to compensate for the losses, leaving total TCG at a minus of 4%.
- Rates for IT/Office products ranged from +17% for media tablets to -27% for desktop computers. Smartphones were down by 5%.
- The trends for MDA/SDA/CE products ranged between +9% for cooling to -20% for audio home systems and food preparation. TV sales recorded +2%. Dental care was flat.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2021 – 44 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

Spain

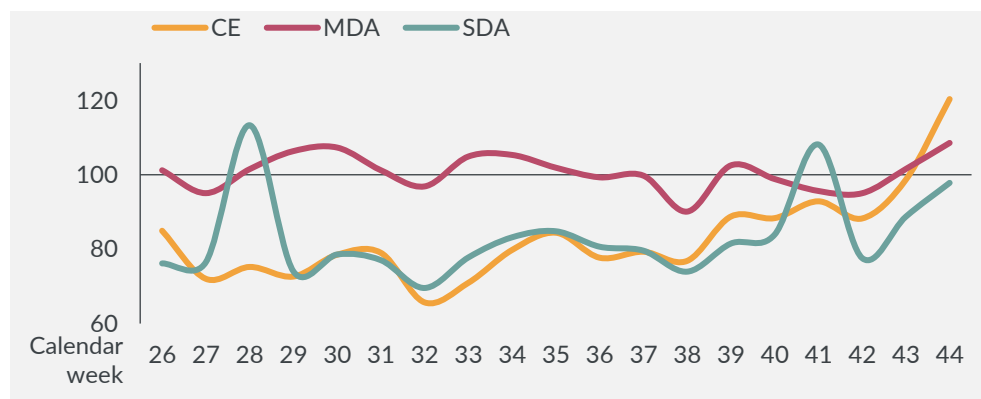
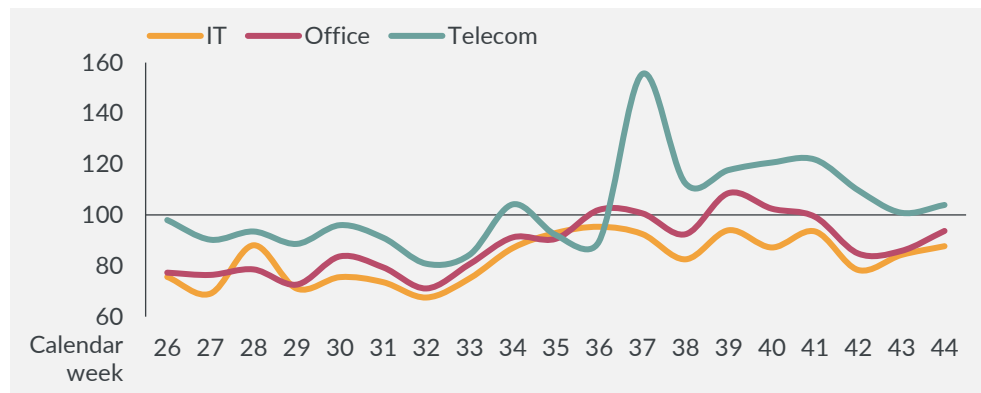
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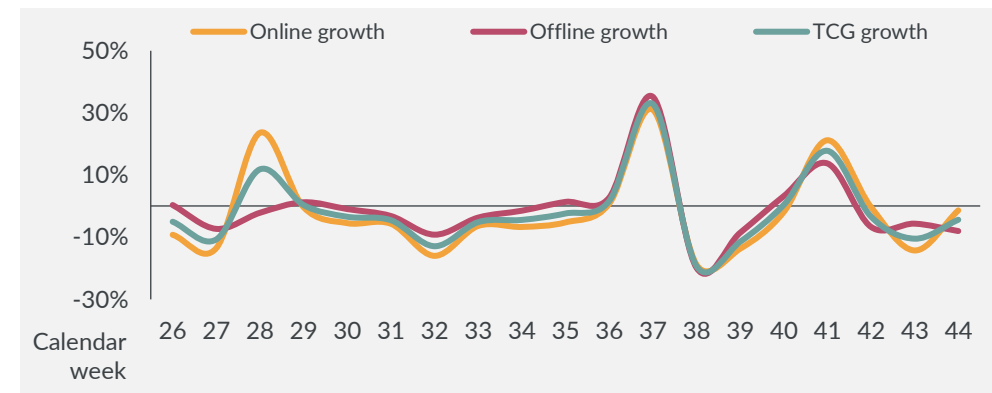
Brazil

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 44 (Oct 31 - Nov 06)

- Online sales delivered -1% and traditional retail fell -8%, resulting in a downswing of the total TCG market of -4%.
- Many IT/Office products posted double-digit negative trends, with desk computing in the lead at -22%. Media tablets were flat. Smartphones lost by 7%. Headsets delivered +8%.
- MDA/SDA/CE products delivered a mixed picture with rates from -21% for audio home systems to +11% for shavers. Cooling was stable.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2021 – 44 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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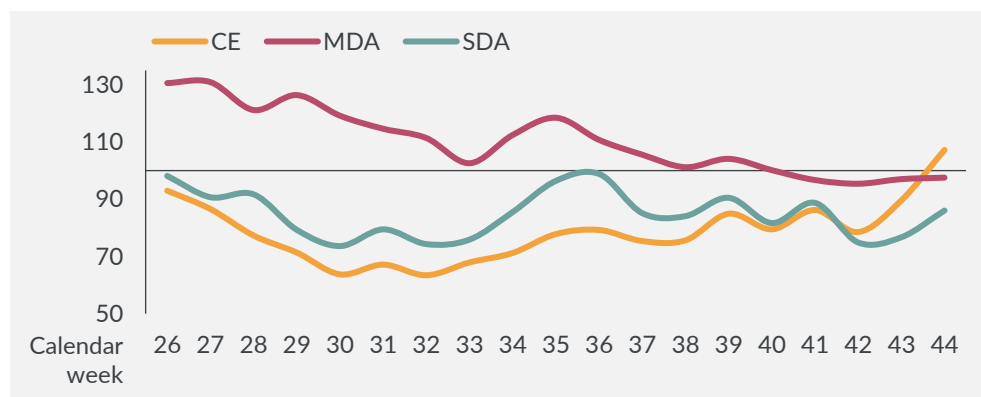
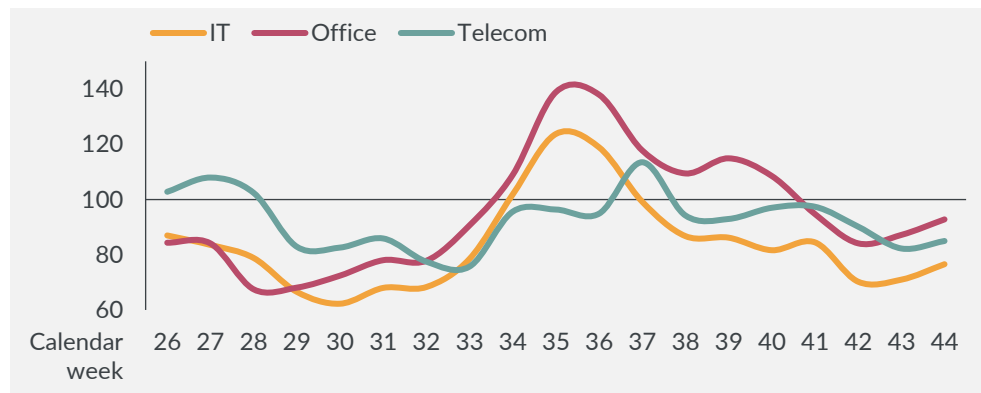
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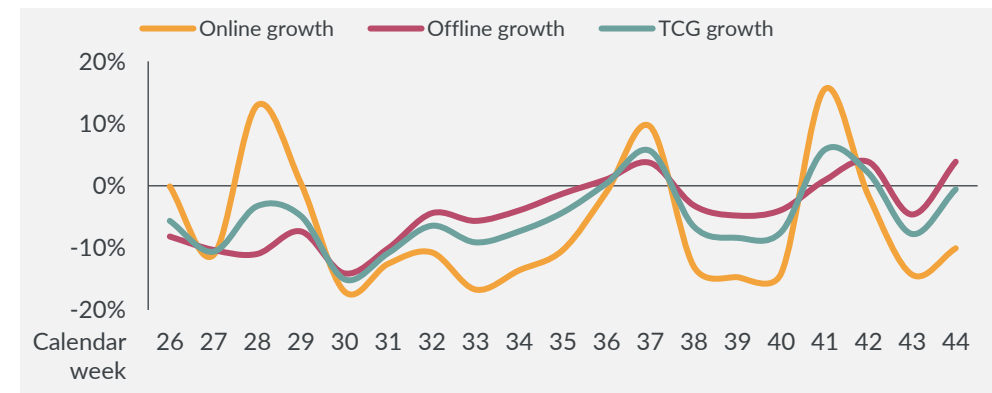
Brazil

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 44 (Oct 31 - Nov 06)

- Traditional retail recovered at +4% (-5% the previous week). Online sales delivered -10% (-14% the previous week). This led the total TCG market to slight downswing of 1%.
- IT products were mostly negative, ranging from -1% for inkjet printers to -28% for desktop computers. Mice were the only positive category at +3%. Smartphones slumped at -12%.
- Many positive double-digit rates for MDA/SDA/CE products saw TV sales in the lead at +28%. Audio home systems were down 24%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2021 – 44 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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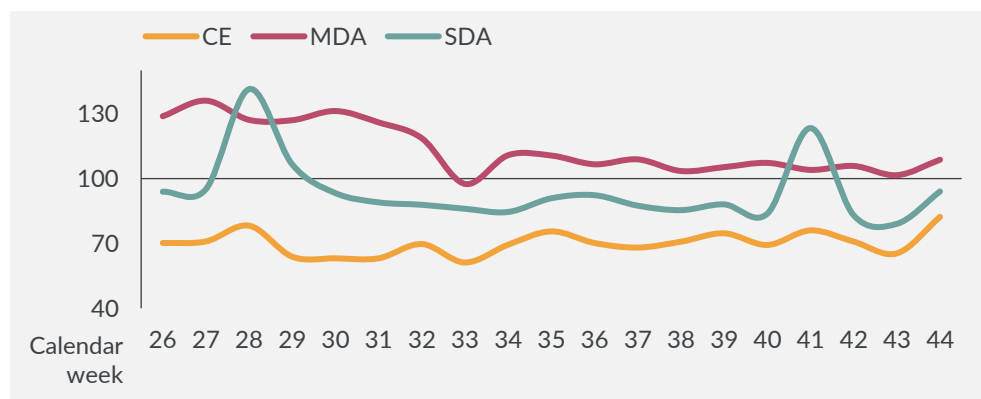
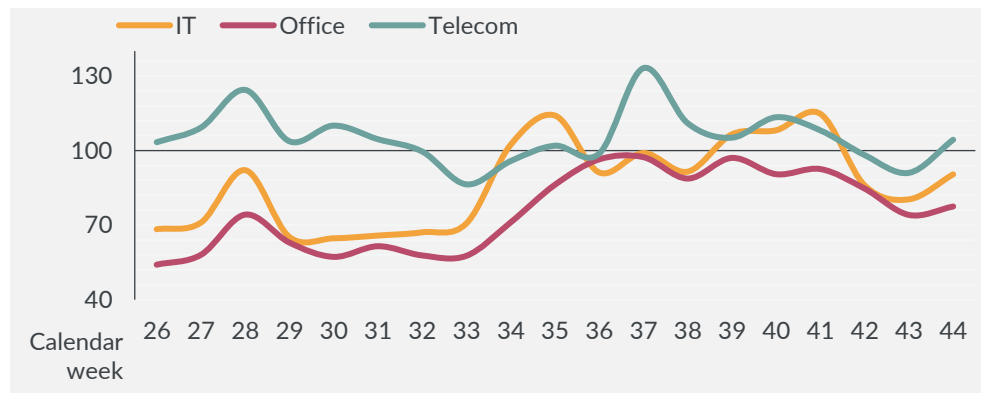
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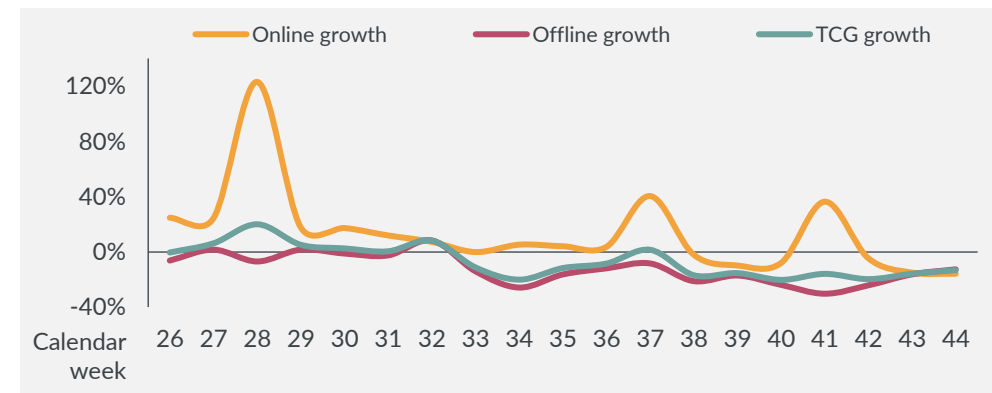
Brazil

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 44 (Oct 31 - Nov 06)

- Deceleration of online sales (-16%) dragged the total TCG market down by -13%. Traditional retail added to it by delivering -12%.
- IT/Office products ranged from -33% for desktop computers to +16% for media tablets. Smartphones decelerated at -2%.
- CE products lost in double-digits with TV sales out in front at -37%. MDA/SDA posted an overall negative picture, ranging from -12% for food preparation to +8% for cooling. Washing machines and vacuum cleaners were flat.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2021 – 44 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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Fact of the week

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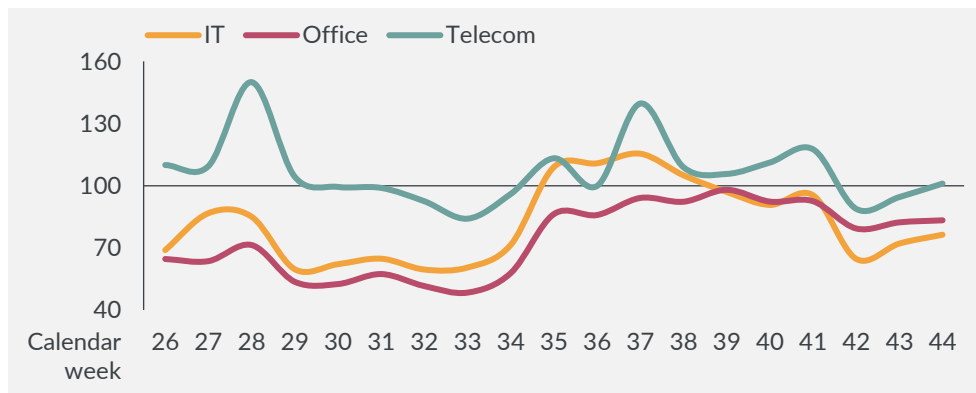
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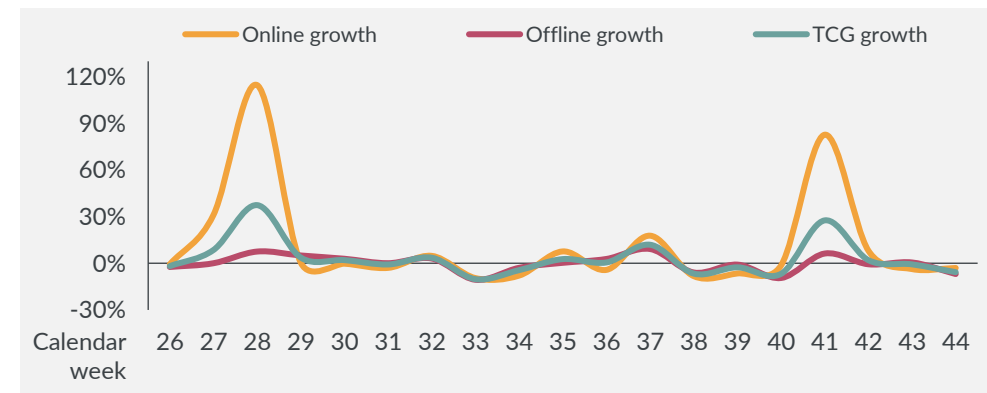
Brazil

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 44 (Oct 31 - Nov 06)

- Traditional retail dropped by 7% and online sales decelerated at -3%, which led to a downswing of the total TCG market of 6%.
- Laser printers were the best performing product group among IT/Office products at +37%. Desk computing slumped at -22%. Smartphones were slightly down by 1%. Headsets delivered +5%.
- A mixed performance in MDA and SDA saw rates between -8% for hot beverage makers and +8% for cooling. TV sales lagged at -18% and audio home systems lost 26%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2021 – 44 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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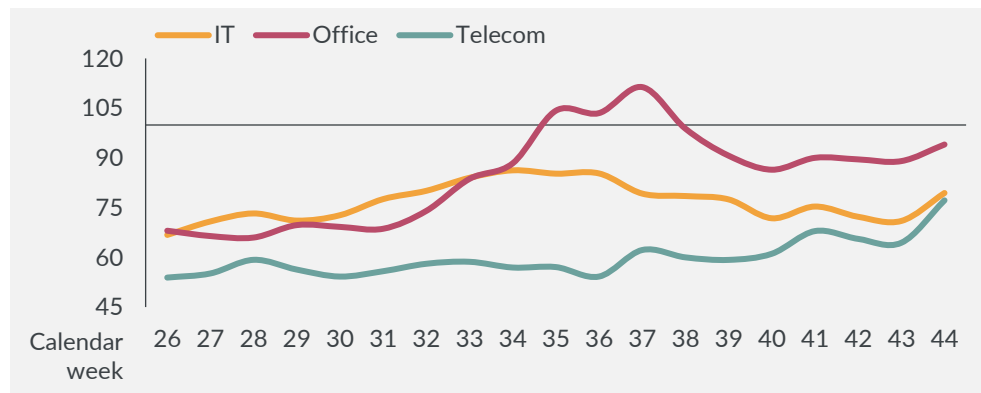
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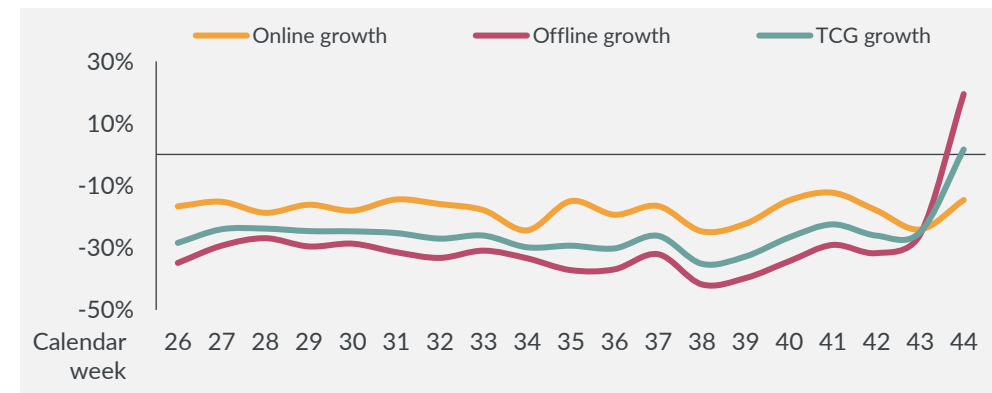
Brazil

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 44 (Oct 31 - Nov 06)

- After many weeks of negative trends, the total TCG market posted +2%. This was driven by traditional retail up 19%. Online sales were at -15%.
- There were many double-digit positive trends for IT/Office products with laser printers out in front at +44%. Smartphones lagged at -4%.
- Audio home systems posted a high growth rate of +150%. Apart from soundbars at -33%, all other MDA/SDA/CE products were positive with rates between +29% for washing machines to a flat dental care.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2021 – 44 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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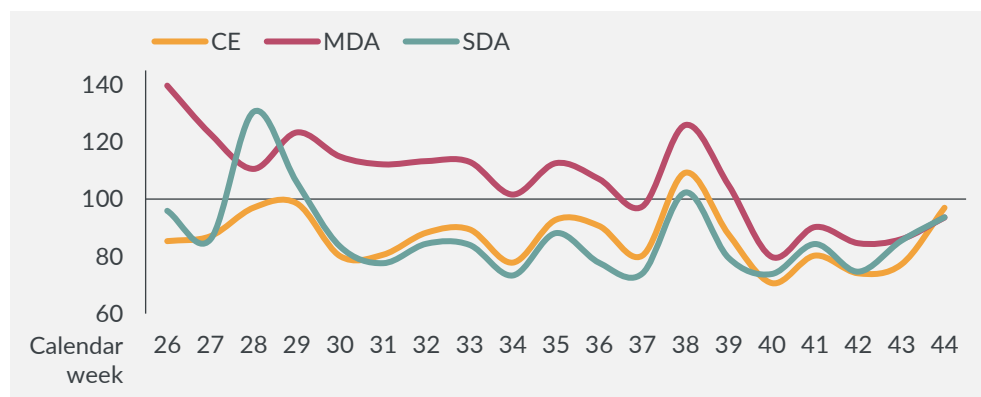
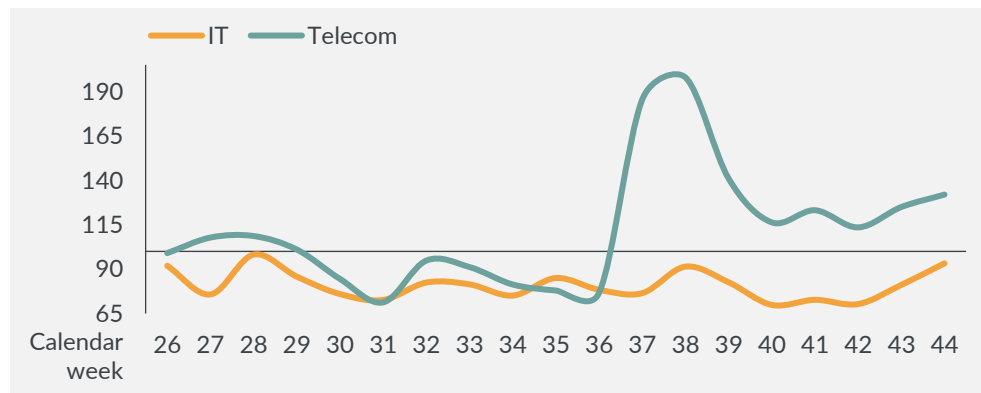
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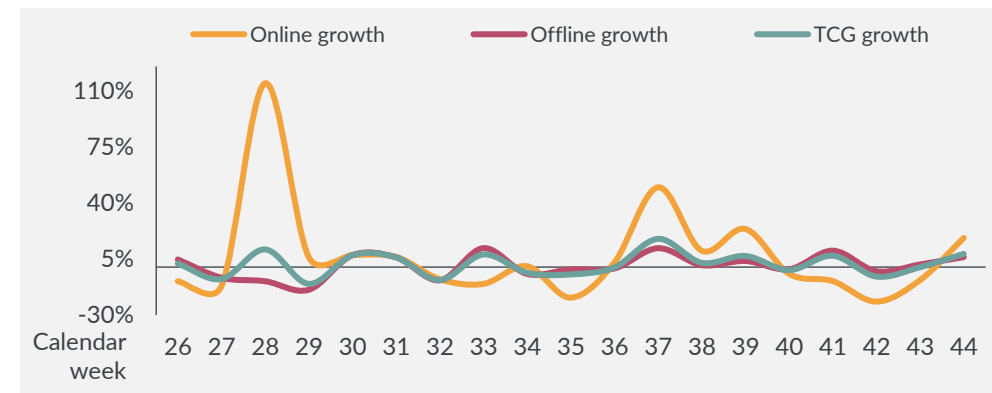
Brazil

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 44 (Oct 31 - Nov 06)

- Both distribution types experienced higher growth rates than in week 43. Traditional retail posted +6% and online sales were up 18%, leading to an increase for total TCG of 8%.
- Headsets and smartphones posted increases of +4% and +33% respectively. Mobile computing was up 3%. Media tablets increased by 9%.
- MDA/SDA/CE products delivered a mixed picture, ranging from +48% for soundbars to -20% for audio home systems.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2021 – 44 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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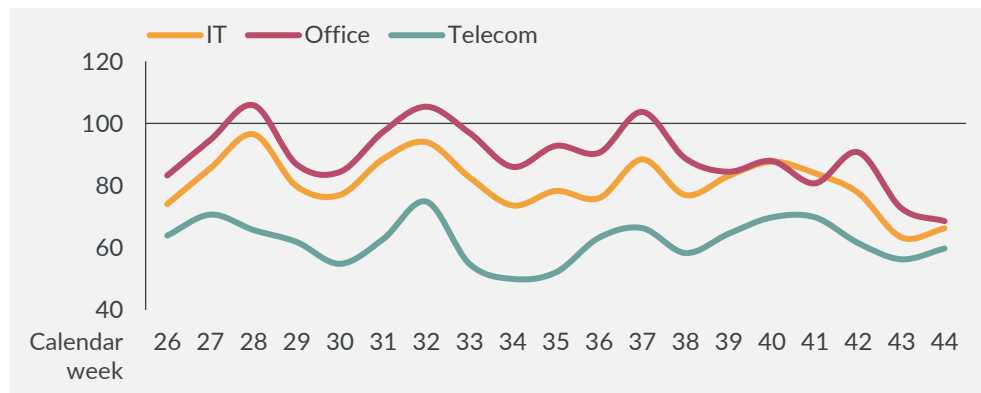
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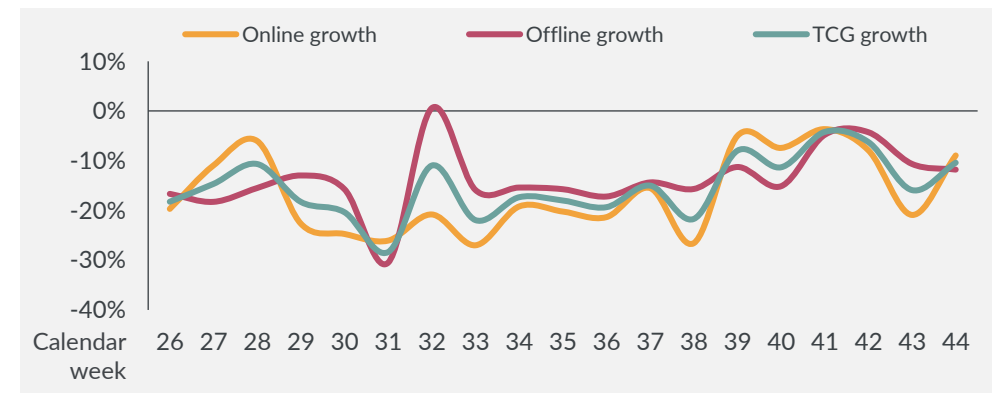
> Brazil

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 44 (Oct 31 - Nov 06)

- Online sales experienced a less negative trend than in week 43 at -9% (up from -21%). Combined with -12% from traditional retail, this delivered a downswing for the total TCG market of 10%.
- Smartphones slumped at -31%. Within IT/Office categories, laser printers were the weakest at -30%. Media tablets and desk computing were up 7% and 3% respectively.
- TVs were the best-performing product group in week 44 at +45%. MDAs lagged at -4%. Hot beverage makers posted +12%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2021 – 44 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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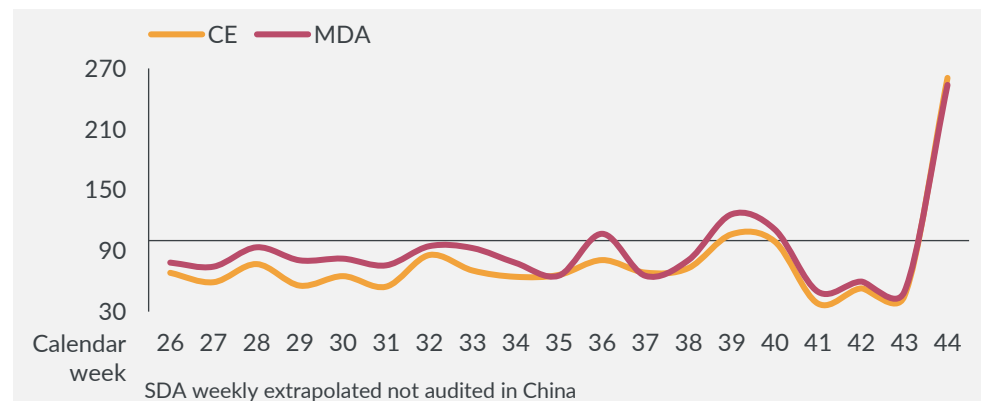
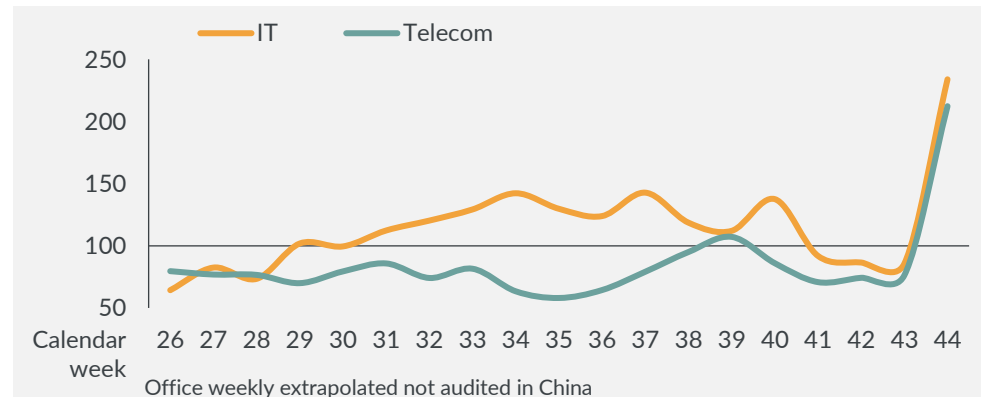
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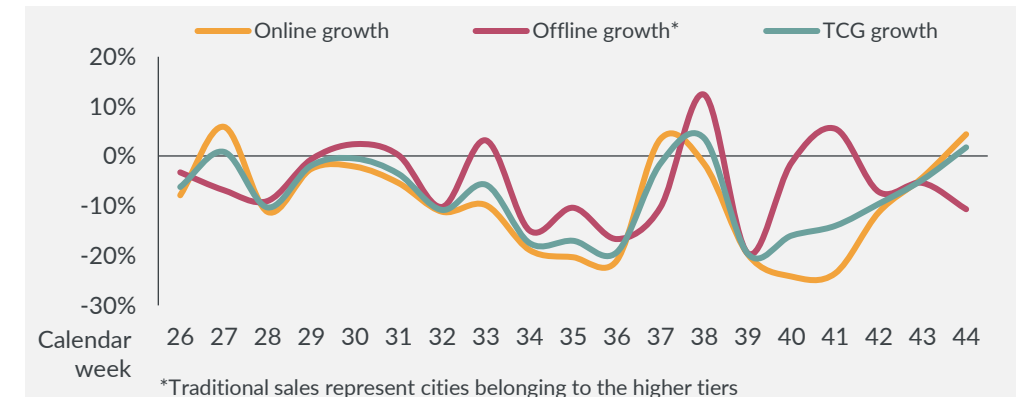
Brazil

> 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 44 (Oct 31 - Nov 06)

- Singles' Day (11th Nov) was already on the horizon. The week before 11.11 saw slight growth vs. 2021 (+2%), driven entirely by online (+4%). Traditional retail declined by 11%.
- Mobile PCs posted an increase of +14% compared to week 44 in 2021. Smartphones were nearly flat at +0.8%.
- TV sales experienced an uptick of 7% while washing machines decelerated by 11%. Cooling was steady.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2021 – 44 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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