The future is NOW!

Future Tech Horizons & Strategies to Navigate 2025 and beyond

Tatjana Wismeth
Head of Distribution & Supply Chain Intelligence

GfK & NIQ

Together we raise the bar

The combination of GfK & NIQ, is creating the world's largest market and consumer intelligence provider.

With unparalleled global reach, measurement capabilities, and innovative technology, Nielsen IQ and GfK together offer the most complete and clear view of consumer buying behavior and tech & durables market tracking.

Our combination is an exciting step for the future of our industry, but we are even more excited about the value it will bring to our brand, retail and distribution partners.

Over 100 years of supporting the industry with leading market measurements

We provide unrivaled Global coverage, present in >100 Countries, representing 95% of the World's GDP

Over 35,000 expert employees, all focused on their commitment to helping clients achieve success

Supporting over 30,000+ clients across FMCG, Tech & Durables Industries

NIQ is a proud partner of the GTDC and its members

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& more…

Be the shapers of tomorrow

Extract the signals from the noise & accelerate your business

Combine both for powerful supply chain insights!

Distribution & Supply Chain Intelligence

Monitor distributor (sell-through) sales across 45+ countries and 300 distributors

POS Market Intelligence

Track POS sell-out to end-customers worldwide

gfknewron Forecasting

Forecast with confidence on market demand

Marketing & Sales Effectiveness

Maximize your campaigns & perfect pricing

gfknewron

One single Platform augmented by GfK Customer Success team.

gfkconsult

Consulting service for strategic questions and business strategies.

Global Economies

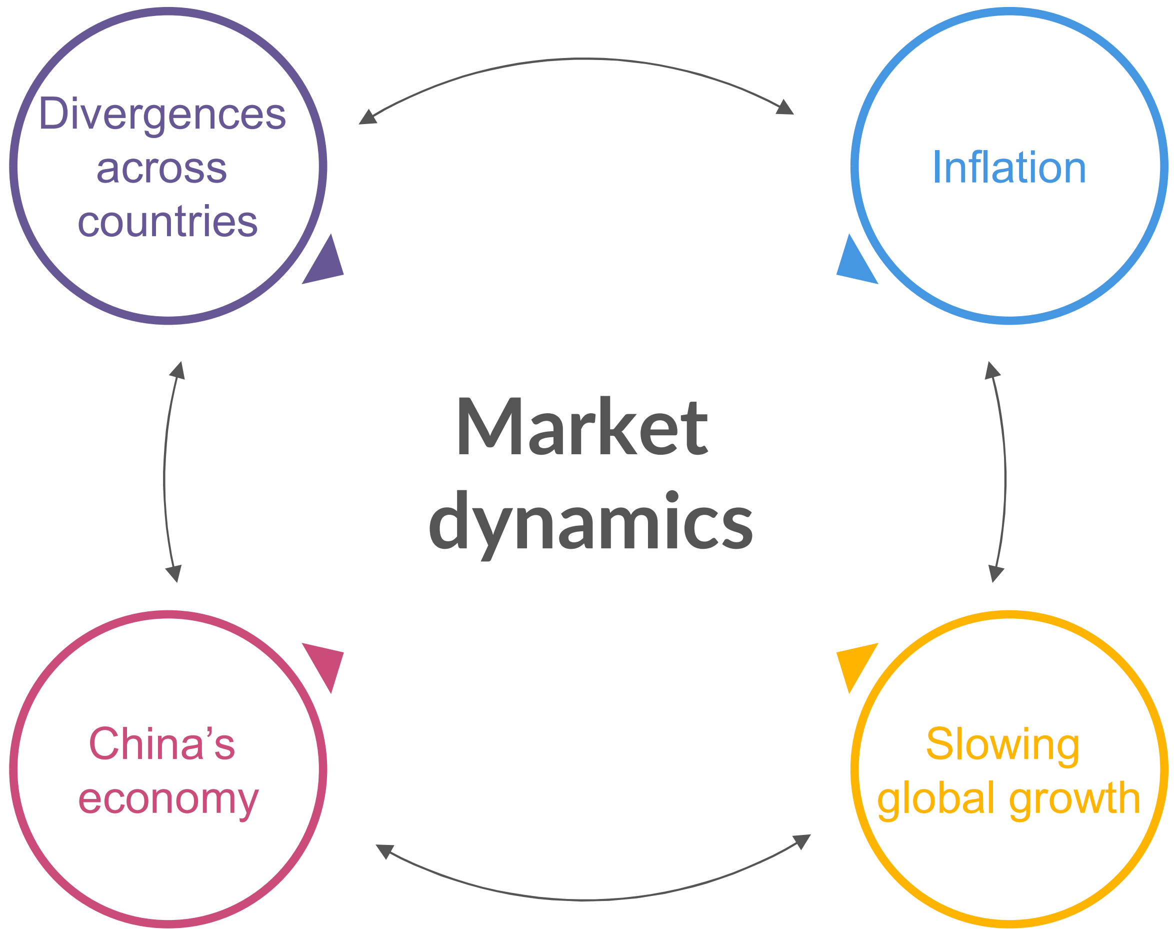
If everything seems under control,
you´re just not going fast enough.
(Mario Andretti)

Subdued global economic growth overshadowed by divergence among major economies

Major themes continue to disrupt market growth and inject further uncertainty

- Wars and geopolitical tensions as well as a rise in protectionist policies continue to amplify divergences across countries. This fragmentation negatively impacts international investment, global trade and supply chains

- Inflation is on track to subside back towards central bank targets in most regions. However, there is divergence between advanced economies and developing and emerging economies; the former are further ahead in bringing inflation back to target



- After 5% growth 2024*, IMF anticipates a 4.6% growth rate for China in 2025, subdued vs previous years.
- China faces ongoing challenges in the property sector, persistently low consumer and business confidence, and structural issues such as high debt levels among property developers and local governments, as well as an aging population.

- 5 year ahead growth forecast for global GDP is around 3%, the lowest in decades, with several factors weighing negatively on growth prospects.
- These include structural economic challenges and debt pressures, which have curbed investment and consumer spending.

* Reuters

Burdened business confidence

However, key markets are able to gain in business confidence recently.

Especially EEU countries are recovering at a fast pace.

Economic challenges burden business confidence globally.

US & EU improve overall while UK´s business confidence even worsened.

Source: Trading Economics, Business Confidence, Update March 2025

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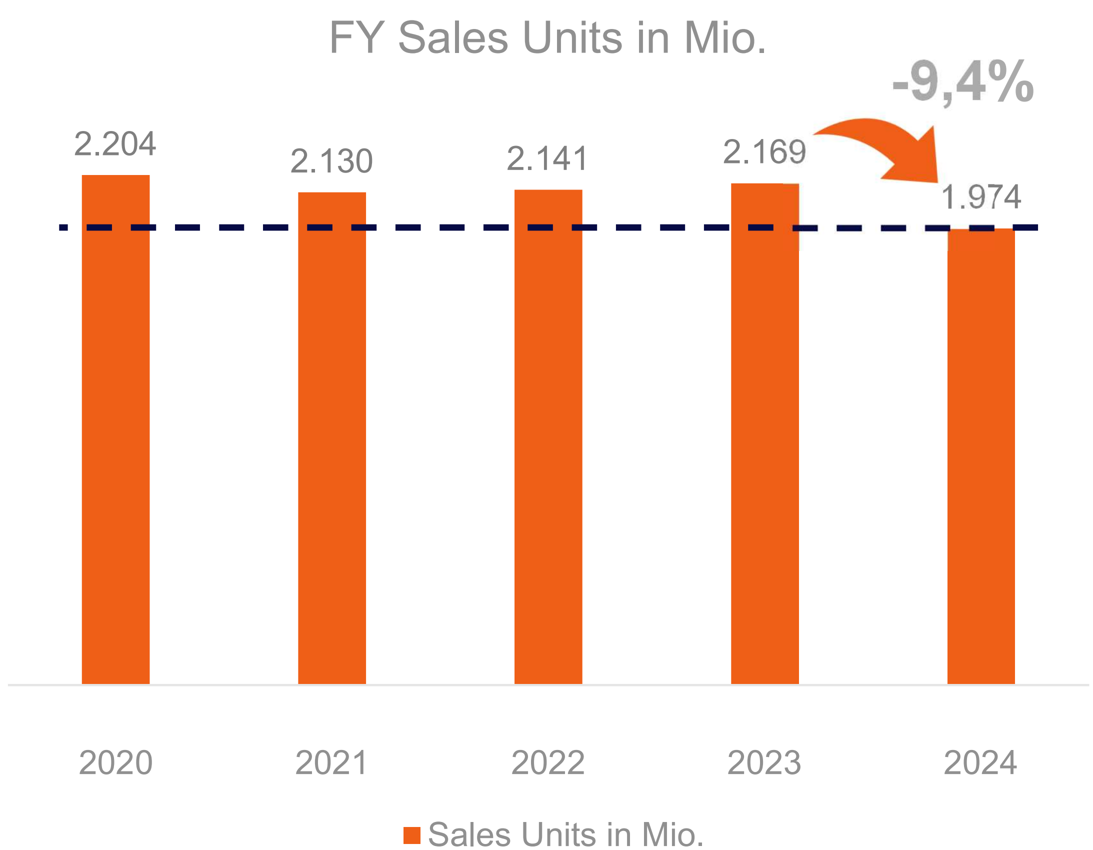
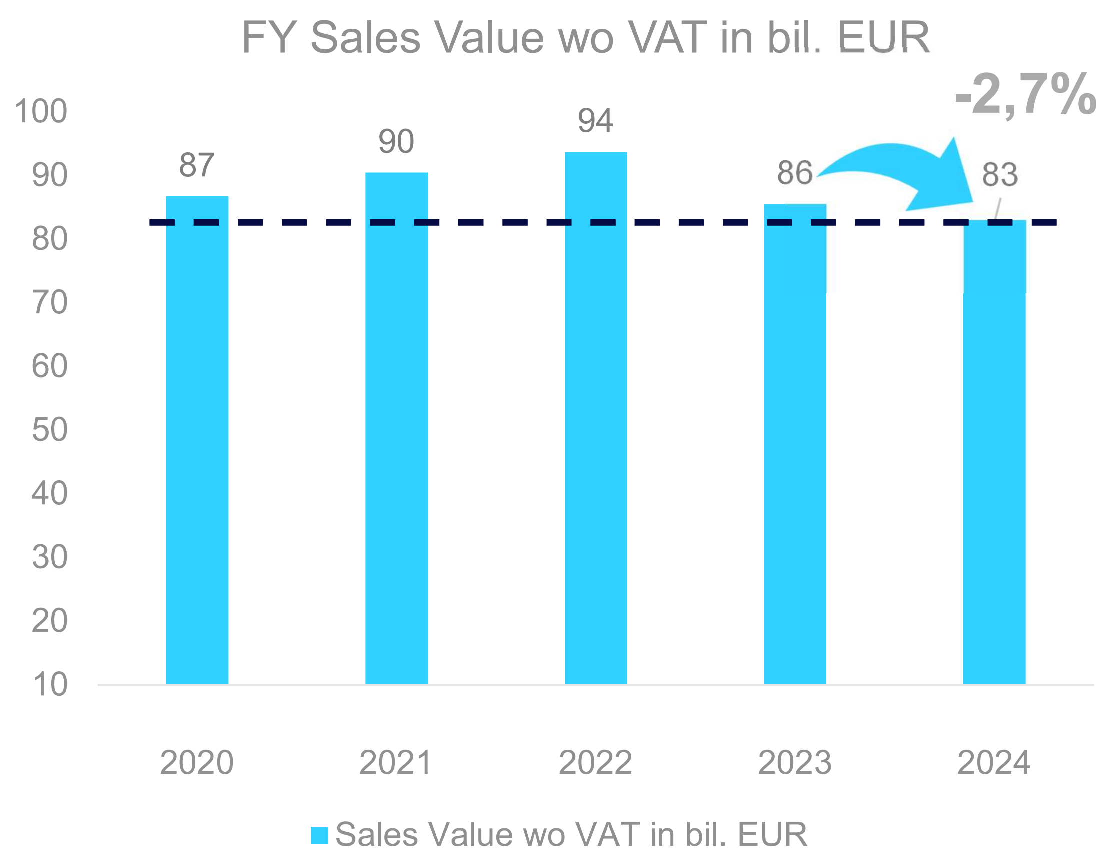
2024 was still behind expectations with lower demand as expected, esp. for major IT.

The pace of decline is however slowing, signaling the long-awaited recovery.

Distribution Europe



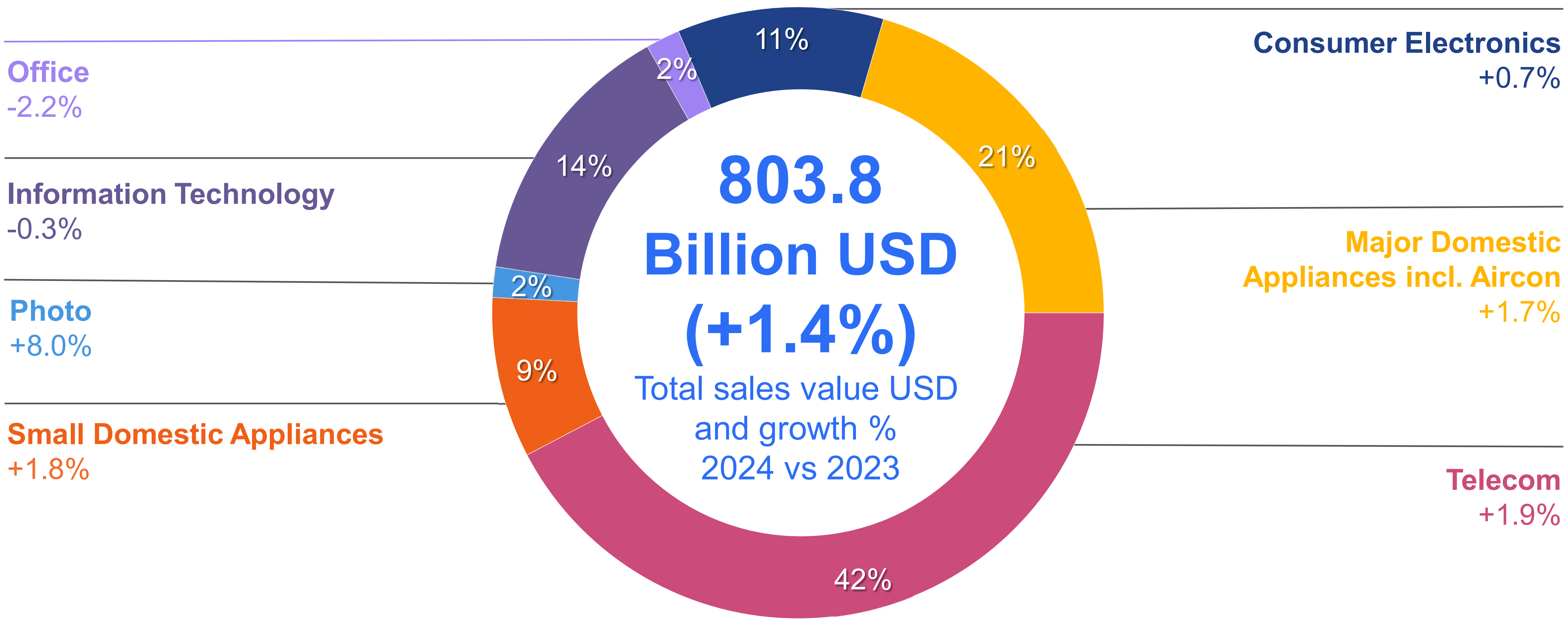


Source: GfK MI: Supply Chain, EUROPE excl. RU/BY

In POS, Tech & Durables markets returns to growth, driven by promotions & subsidies

Consumers continue to rationalize purchases – political stimulation programs (e.g., China) show effect

Global (ex. NA, RU) Point-of-Sale Markets, Tech and Durables | Sales Value USD (NSP) | Growth rate YoY (%) | Jan 2024 – Dec 2024

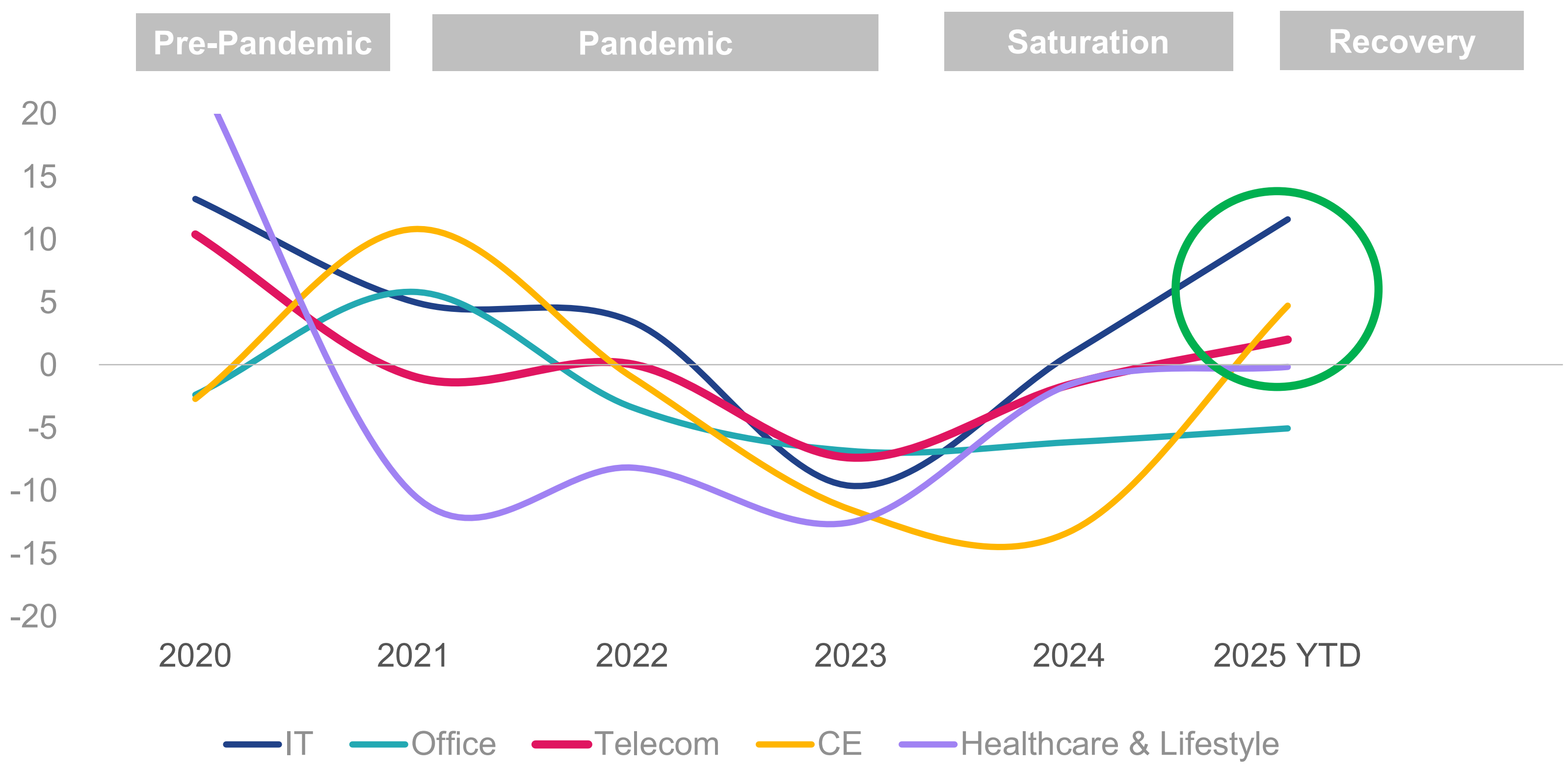


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia)

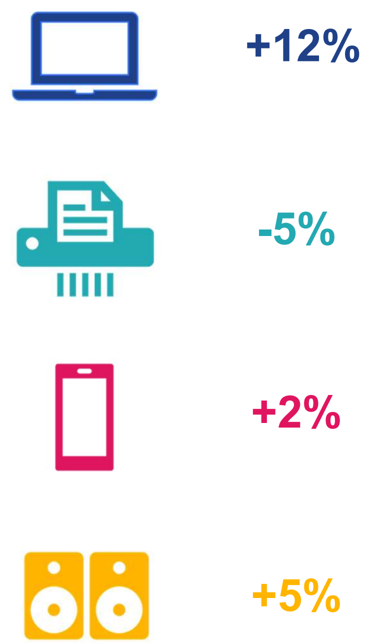
Sectors Move Beyond Negative Growth, Approaching Pre-Pandemic Levels

As pandemic timelines shift, most sectors are recovering, nearing or surpassing the 0-growth threshold

Europe (excl. RU/BY) Distribution Market | FY2024 Growth Rates in % | Sales Value EUR wo. VAT



Growth rates
2025 YTD vs. 2024 YTD



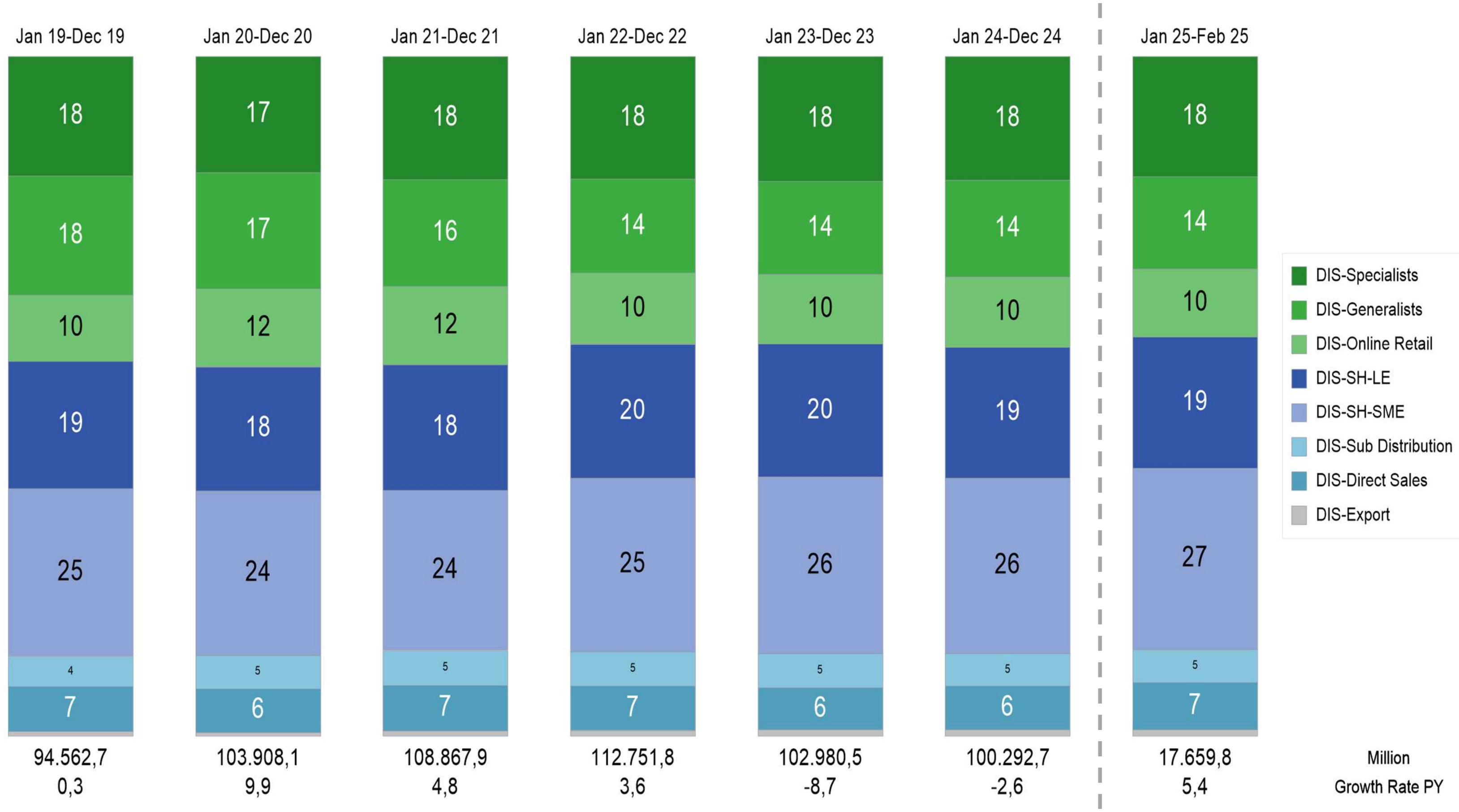
Source: GfK MI: Supply Chain, EUROPE excl. RU/BY, Growth Rates Sales Value EUR wo VAT, all channels, all product groups

Small & Medium System Houses Post the Strongest B2B Channel Performance at +9%

Generalists grow +6% YoY, but continue to decline in overall share since the pandemic

EUROPE Distributors

Jan 25 – Feb 25
Sales Value in EUR, %



Growth rates
YTD 2024 vs. YTD 2025

Specialists **+3%**

Generalists **+6%**

Online Retail **+3%**

System Houses *large* **+2%**

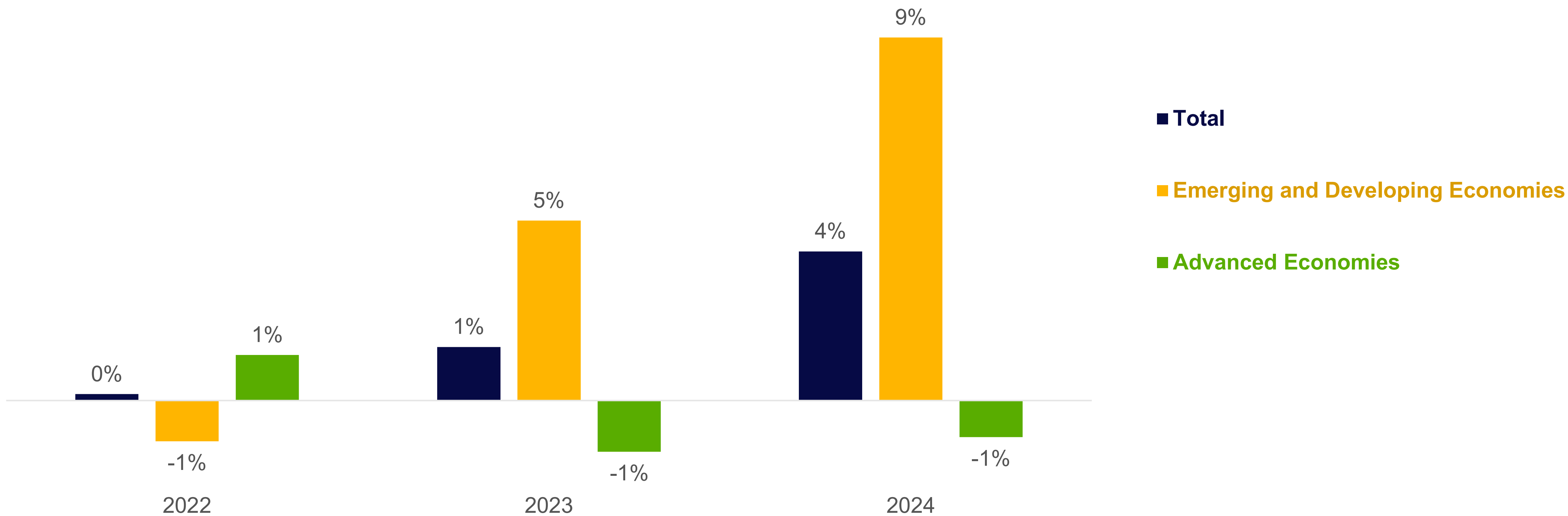
System Houses *small/medium* **+9%**

Source: GfK MI: Supply Chain, Europe wo. RU + BY, B2B + B2C, all facts are based on Value wo. VAT in bn. EUR

Emerging Markets Drive Strong Growth, While Advanced Economies Face Headwinds

Robust expansion in developing economies contrasts with slower recovery in advanced markets

Global (ex. NA, RU) Point-of-Sale Markets, Tech and Durables | Sales Value USD (NSP) | Growth rate YoY (%) | IMF classification for regions followed FY



Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Sales revenue growth per year vs previous year
Definition of regions is based on [IMF classification]
Global TCG Trends Report Q3 2024 – Global Strategic Insights

Global Economies

- Geopolitical challenges & Tariffs burden markets with expected impacts on prices
- Key markets win in confidence
- Signs of recovery for Tech markets thanks to replacements, esp. In IT
- Emerging markets leading the way, supported by continuous SMB channel demand

Adapt, but quickly

Risks		Present		Future
Deglobalization Protectionism Tariffs Wars Supply Chains	›	Recovering, but conditional Market Demand Emerging vs. Developed markets	›	Need for Adapting business & processes

Mitigate risks by data-driven business decisions

- Optimize Supply Chains & Partnerships
- Allocate resources efficiently
- Identify sustainable growth areas

Growth Areas

IT is back -

No, it's not a sequel, it's an upgrade!

AI-related hardware (*+40% growth per year*) and software (*+55% growth per year*) market could reach up to

$990 billion

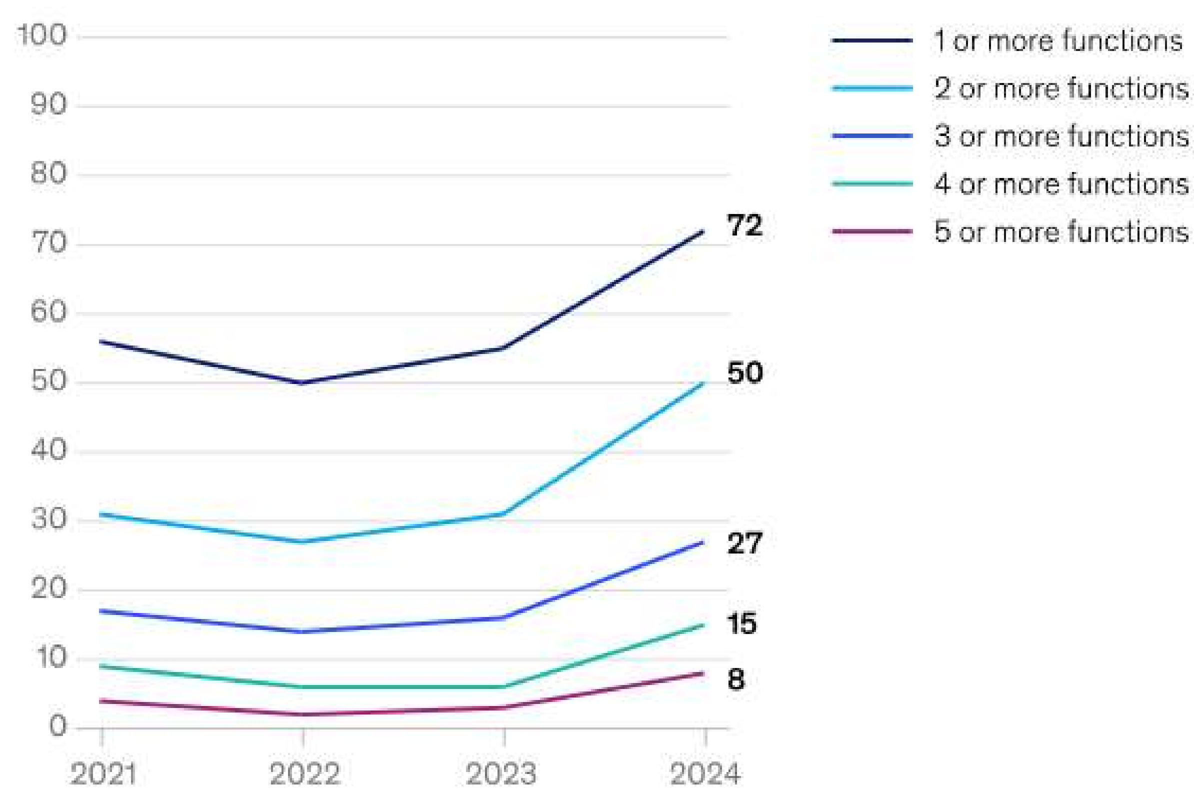
US dollars by 2027

Source: Bain & Company

B2B AI adoption surging with GenAI displaying broader AI capabilities

Organizations see material benefits with cost decreases and revenue growth

Business functions at respondents' organization that have adopted AI
Percentage of respondents

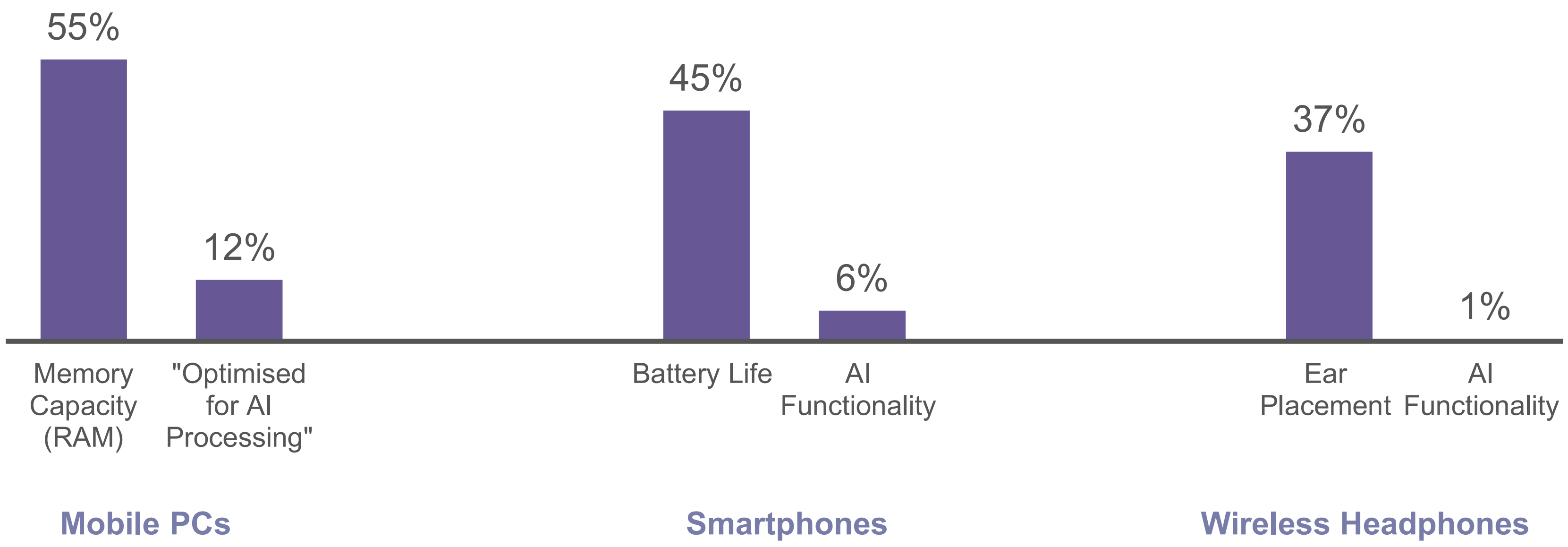


Source: [The state of AI in early 2024 | McKinsey]

AI optimization as choice driver for consumers?

AI Functions not yet on top of consumers' minds which gives room for innovation!

Which of these product features were most important to your final choice?
Percentage of consumers confirming statement above



Source: gfknewron Consumer; Choice Drivers per category; Q2 2024. Countries: AT, BE, BR, CL, FR, DE, GB, GR, ID, IT, JP, NL, PL, ES, CH, TR

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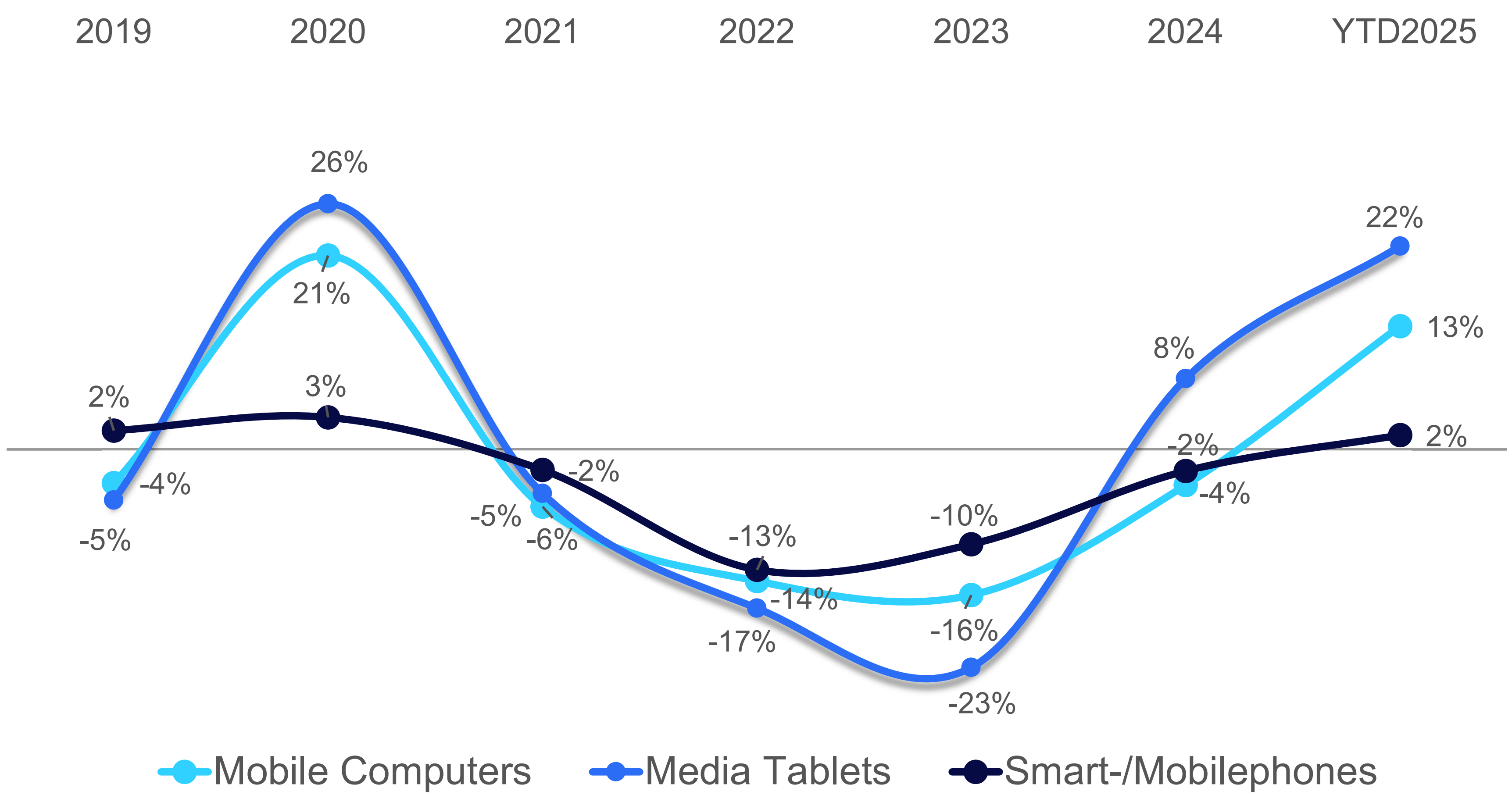
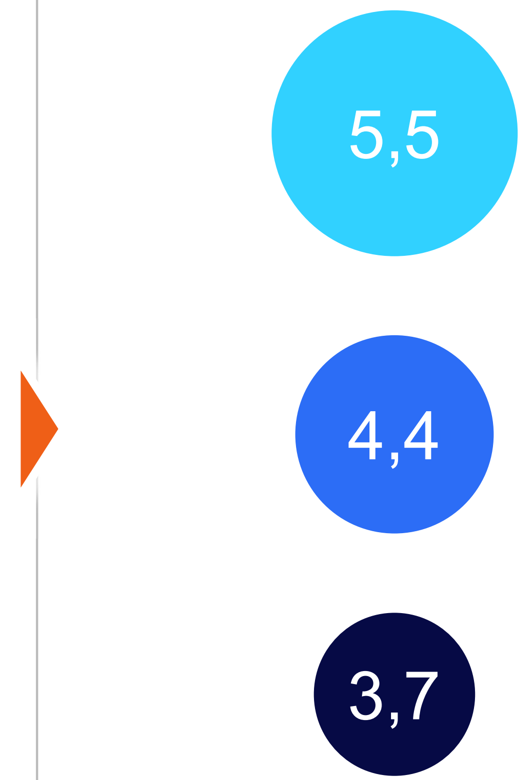
gfknewron reveals: 2025 will be the year of replacements!

Distributor sales (sell-through) show beginning replacement cycles with full potential to be unfolded in 2025.

Global (ex. NA, RU/BY, APAC) Distribution Markets | Growth rate YoY (%) | Jan 2019 – Dec 2024, Jan 2025



Average age of previous product



Source: GfK MI Supply Chain, Global excl. RU/BY and APAC, Sales Unit Growth per year until 2025 (Jan)

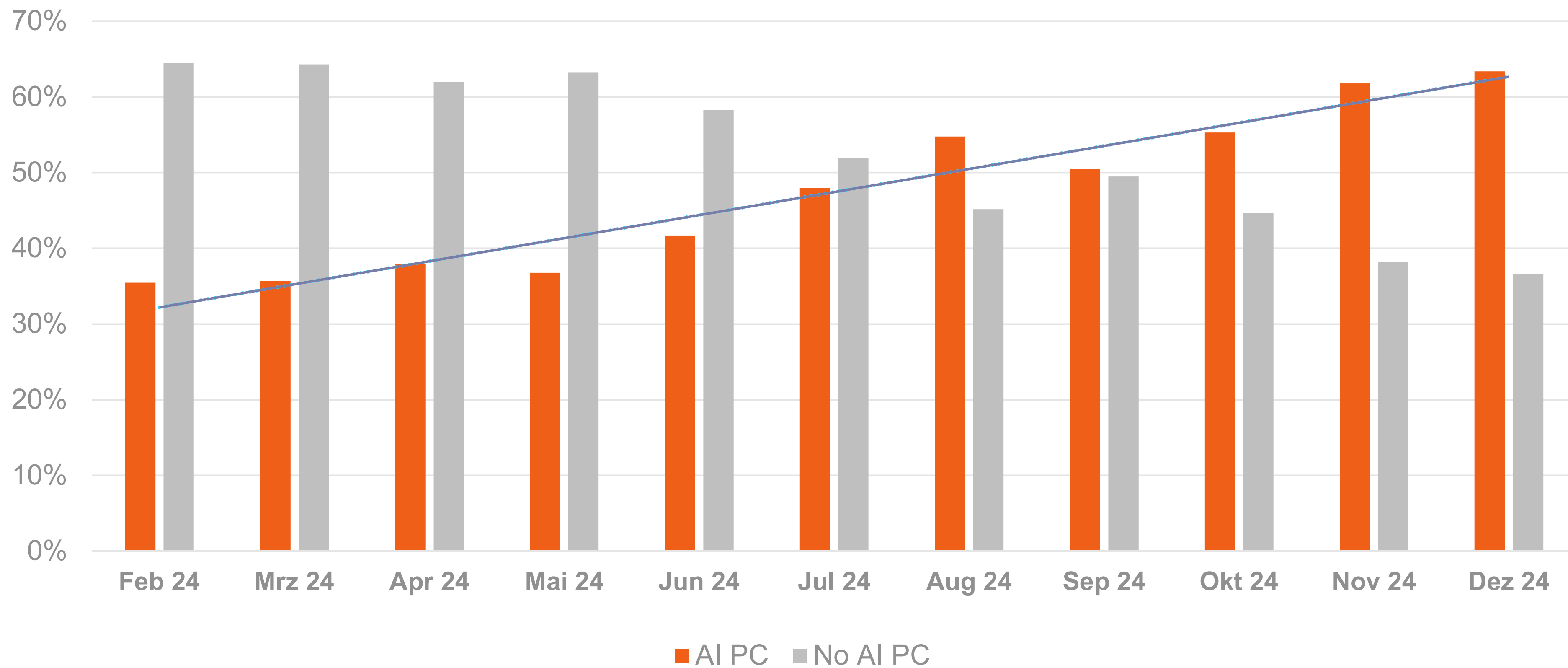
Source: gfknewron Consumer, Av. Age of previous product

AI PCs on the Rise: Surpassing Traditional PCs in Market Share

AI PCs are outpacing traditional PCs as efficiency and intelligence become key priorities

Information Technology

EUROPE Distributors FY2024
Sales Value EUR wo. VAT, Growth Rate % PY

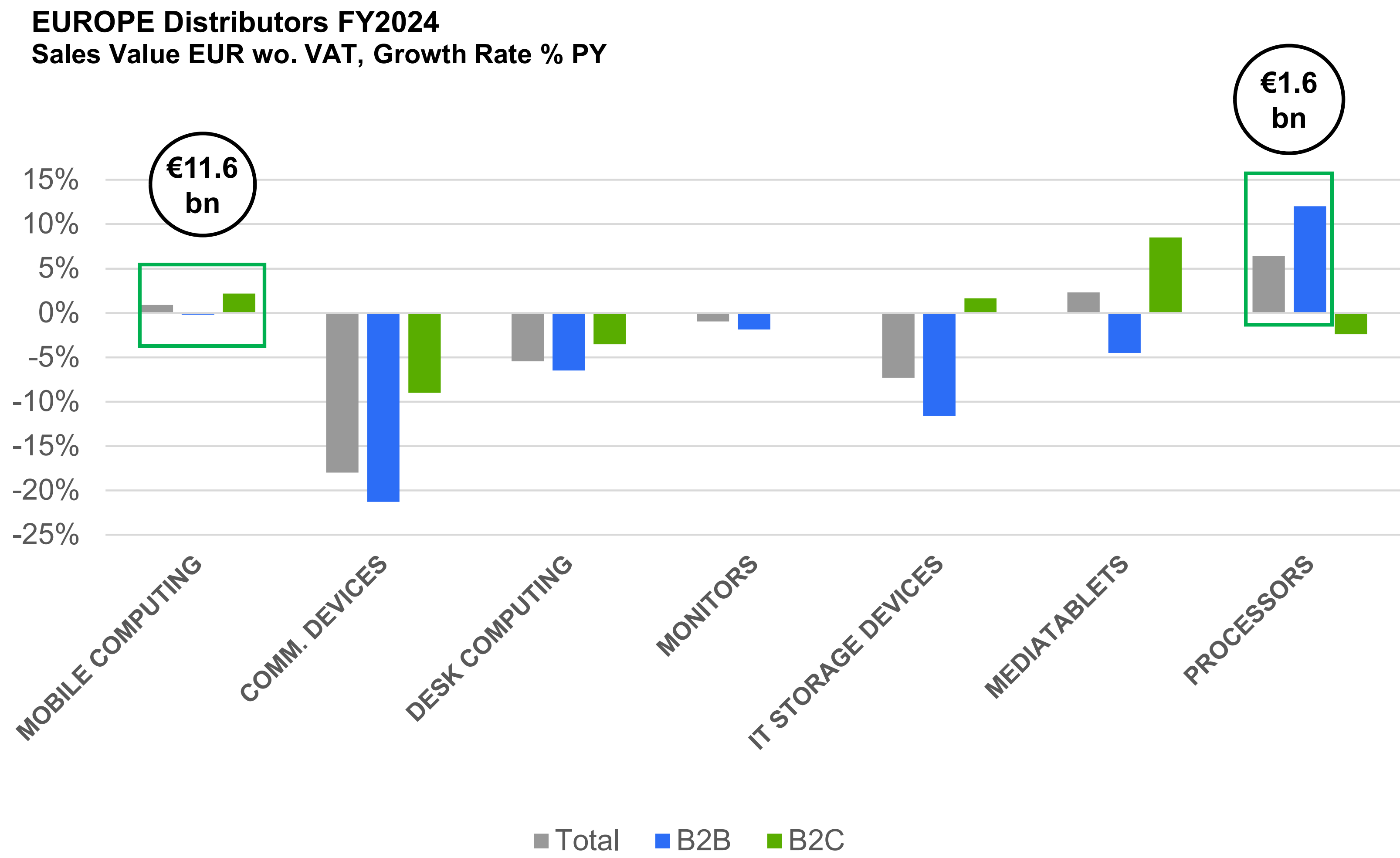


Source: GfK MI: Supply Chain, EUROPE excl. RU/BY, Groth Rates Sales Value EUR wo VAT, all channels, all product groups

Information Technology

Mobile PC Replacement Cycle Fuels IT Growth

AI PCs and Refresh Cycles Drive Growth in the IT sector



Source: GfK MI: Supply Chain, EUROPE excl. RU/BY, Groth Rates Sales Value EUR wo VAT, all channels, all product groups

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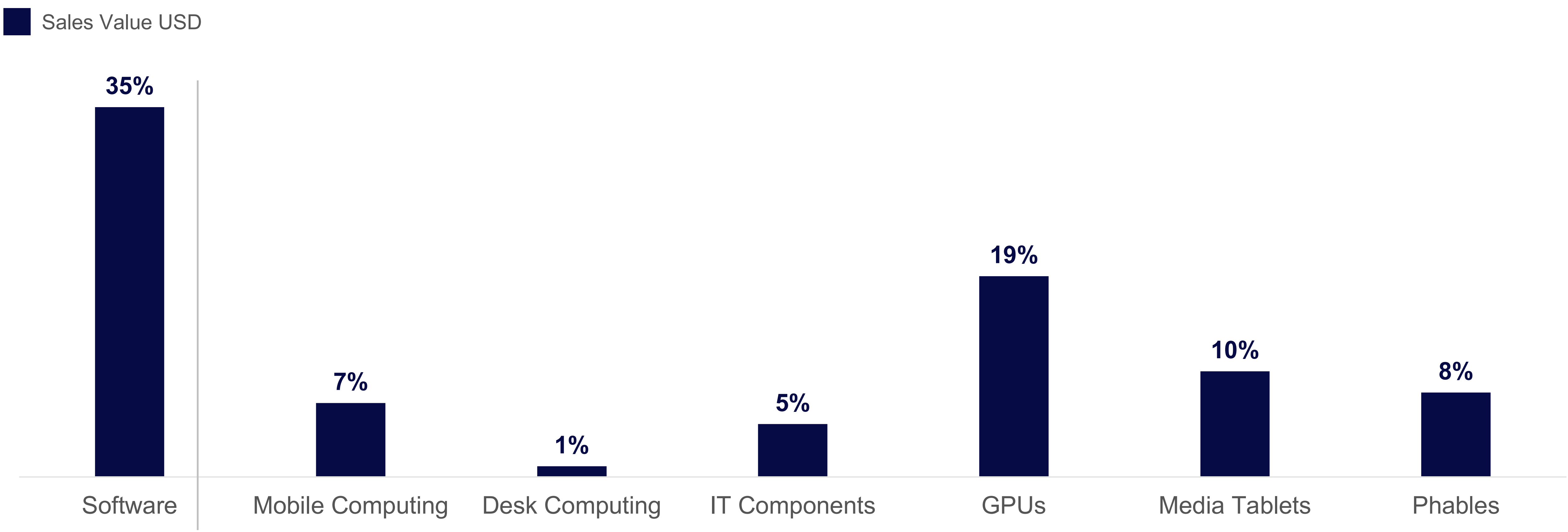
The “AI-effect” is materializing in distribution software and hardware sales

2025 starts with promising growth rates for distributors´ core business

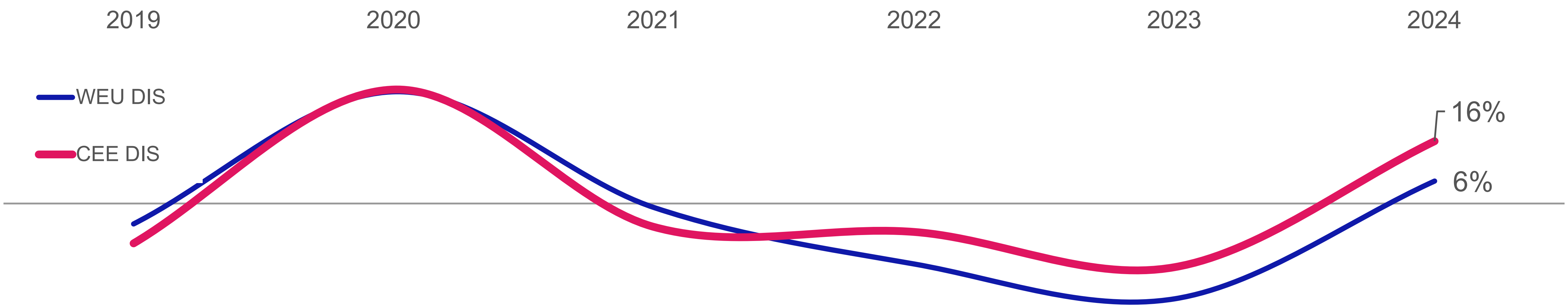
European Distribution Markets | Growth rate YoY (%) | YTD2025 vs. 2024

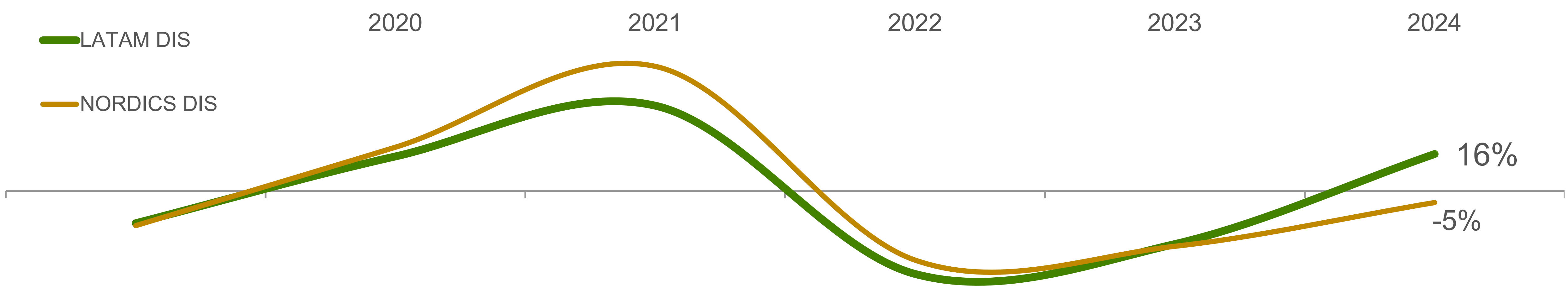


Source:

Also for this category, emerging markets outperform developed regions.

CEE and LATAM lead unit growth, while Nordics lag behind in a slower recovery

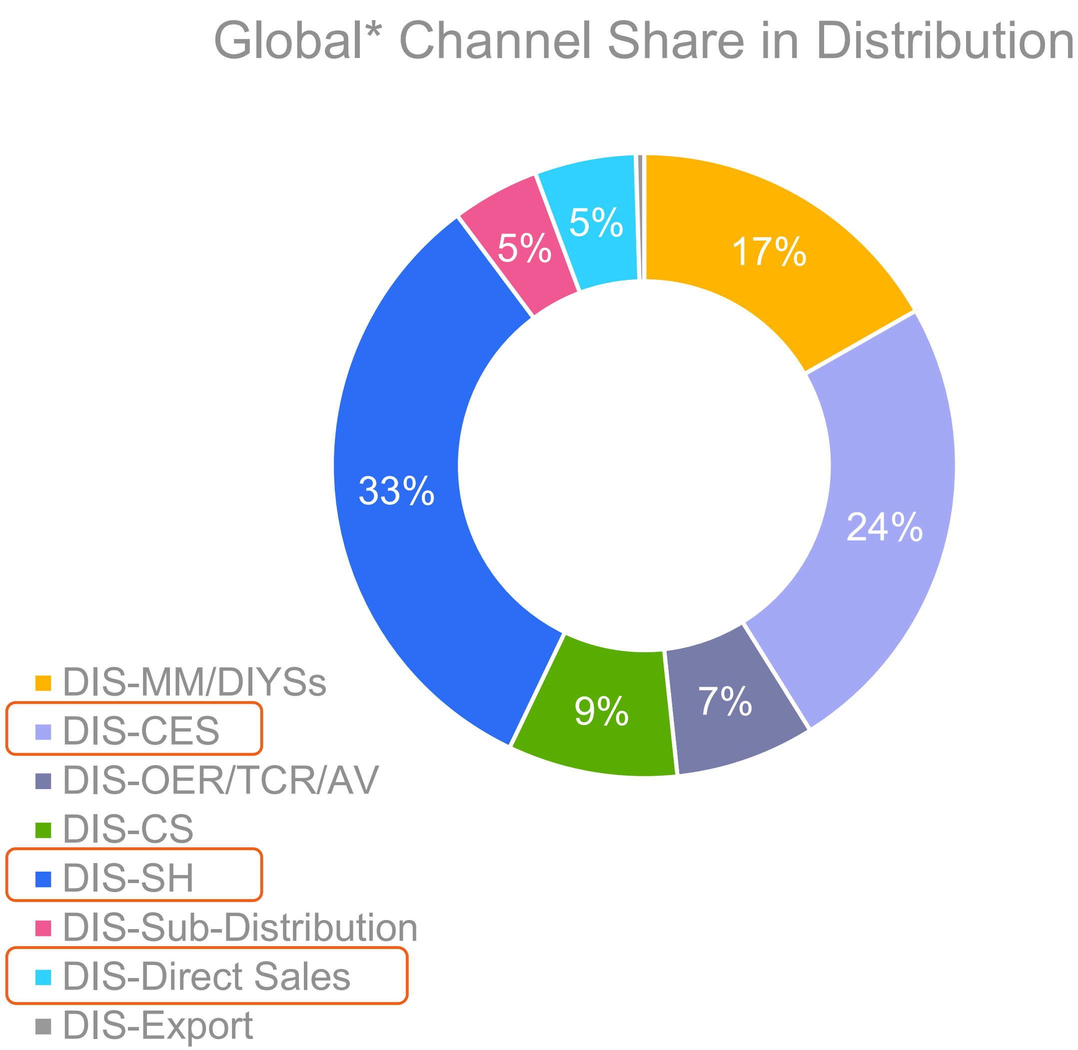




Source: GfK Market Intelligence, GfK MI Supply Chain, Global excl. RU/BY and APAC, Sales Unit Growth per year

But it is also important to have clear visibility on channel demands

Most MediaTablets sold by distributors are supplied to Systemhouses.
5% are even sold directly to verticals.



43%

of Media Tablets are sold to B2B channels by distributors

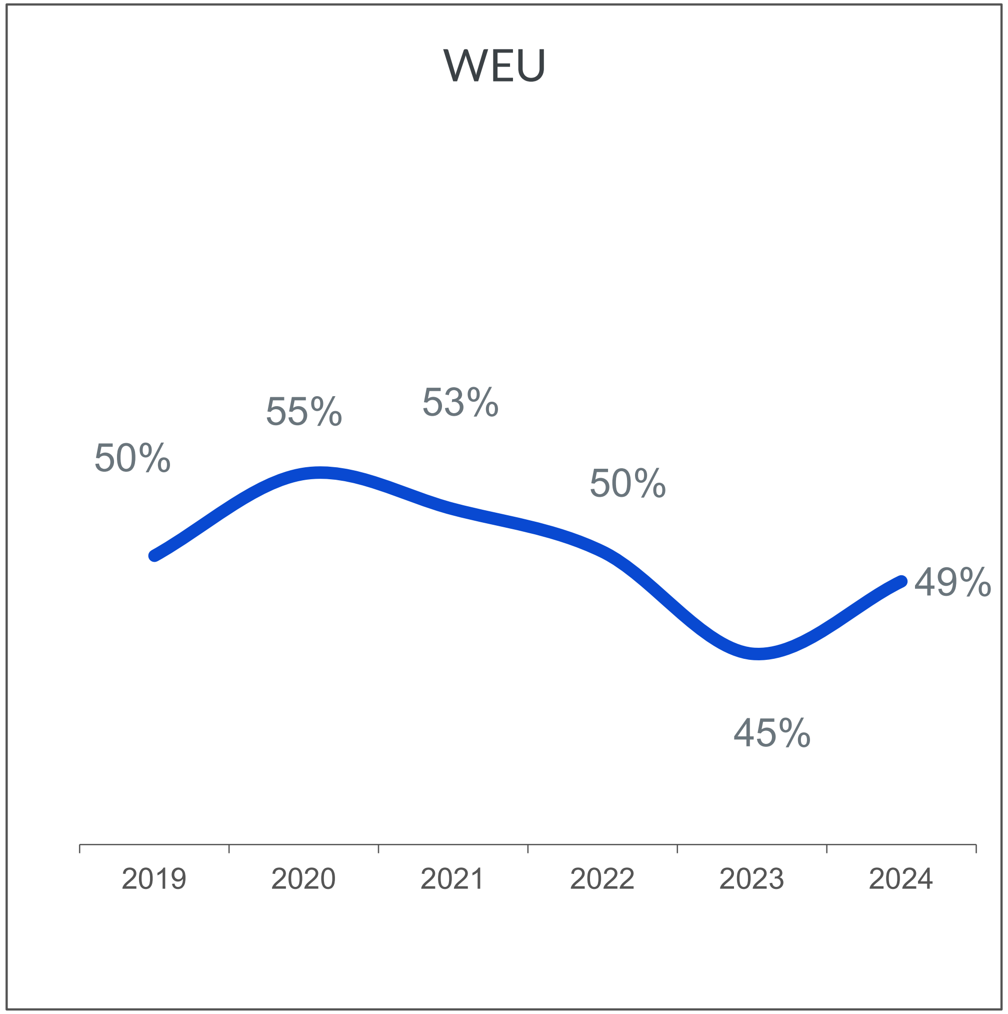
Source: GfK Market Intelligence, GfK MI Supply Chain, Global excl. RU/BY and APAC, Sales Unit Share by Channel 2024 YTD; Tier Overlay Europe 2024 YTD

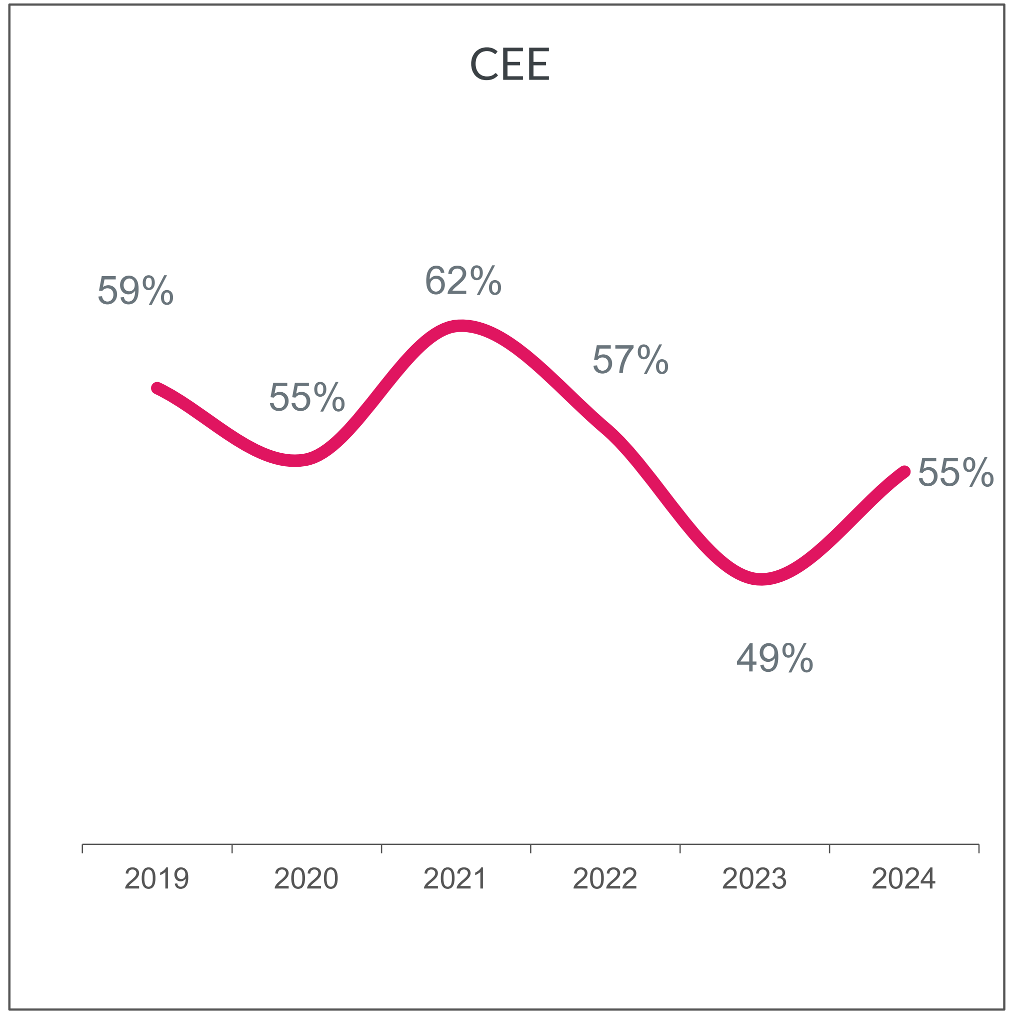
But to be successful across markets, you also need to understand sourcing patterns.

Fragmented retail landscapes and supply chain complexity drive higher distribution use in emerging markets like CEE.

Regional differences

% of POS volume which was sourced via distribution in sales units

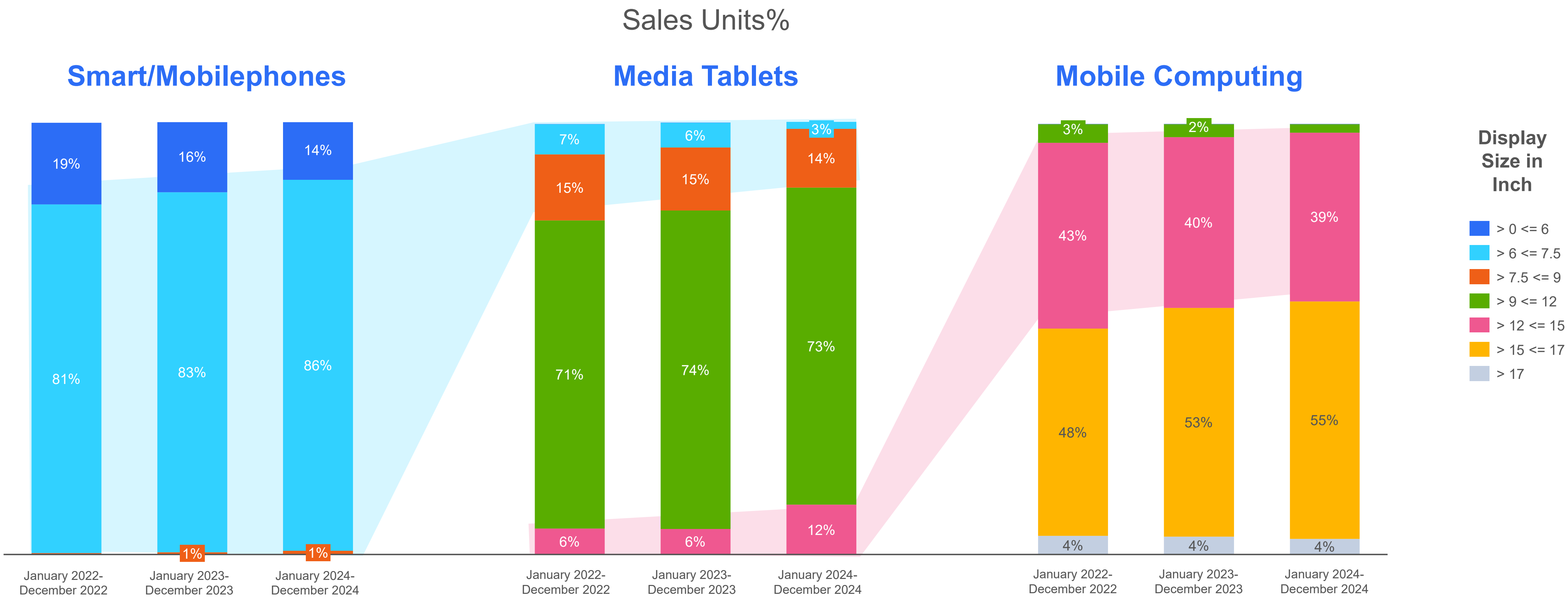




Source: GfK Market Intelligence, GfK MI Supply Chain, Tier Overlay by region

Shifting Screen Preferences Reshape the Device Market

Larger smartphones reduce demand for small tablets, while the rise of 12-15" tablets impacts compact notebooks



Source: GfK Market Intelligence; Global wo NA/RU

Growth Areas

- AI with potential to significantly uplift IT markets to nearly 1 Trillion in Sales
- Concerns and barries still persist and needs support of distributors & the channel
- AI-effect already visible in hardware markets and software sales
- Replacements to be fully leveraged in 2025
- IT-Hardware & Accessories benefitting especially
- Understanding Supply Chains & having the right partners is vital for success!

Be prepared

Risks

Tariffs

Unclear product value

Security Concerns

Price Sensitivity

Present

Beginning Replacement cycles

Early stage of AI

Future

Need for Costumer Education

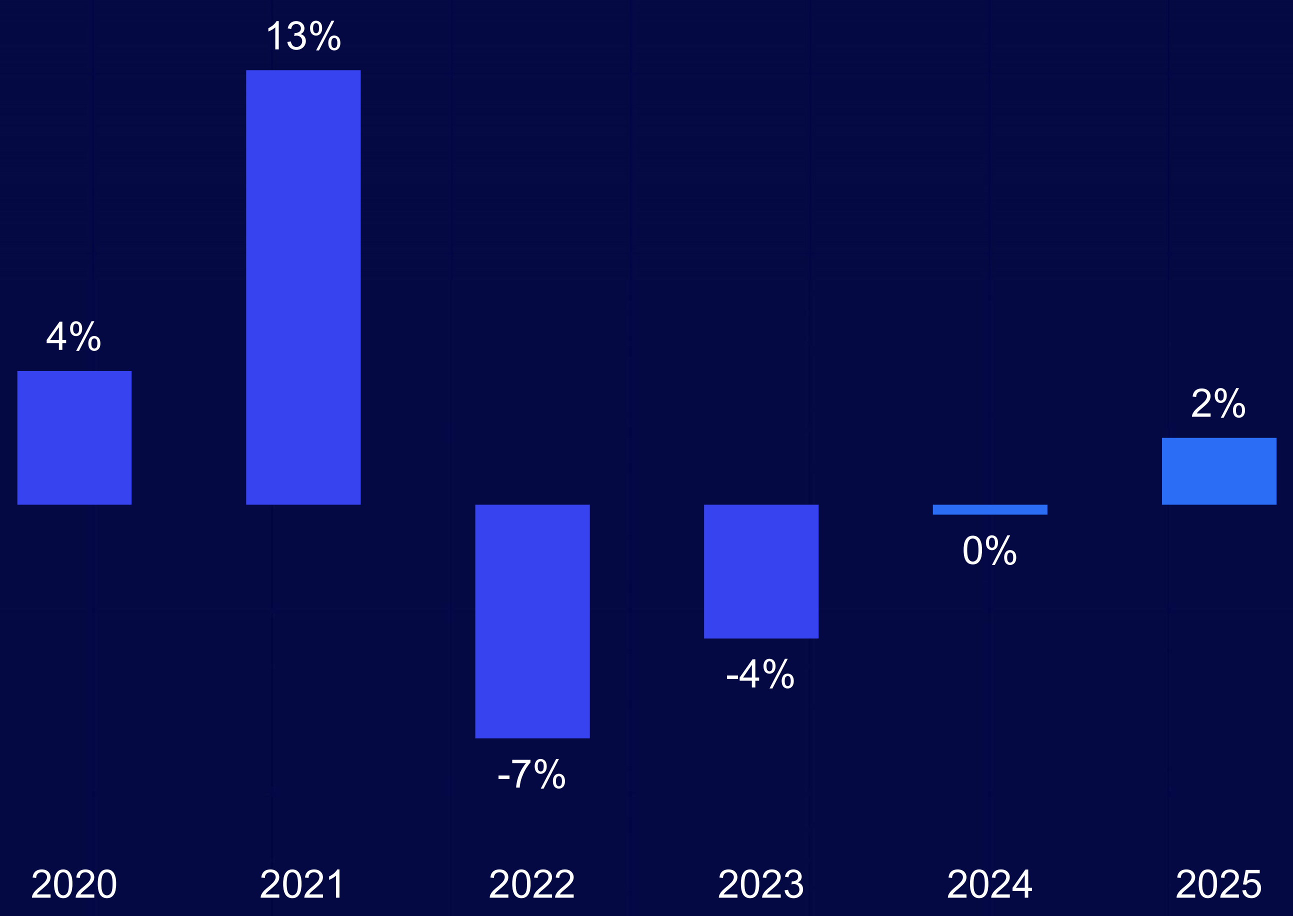
Mitigate risks by data-driven business decisions

- Identify costumer concerns & sales barriers
- Understand product sourcing
- Select the right partners

2025 Growth Trends Momentum, Shifts & What's Next

Tech and Durables Outlook 2025

Global growth and growth projections in revenue USD



T&D is set for growth in 2025
with IT being amongst the primary drivers

GfK Market Intelligence and total market estimation incl. North America, based on USD Forecasting date: Feb 17th,2025, assuming stable USD exchange rate | North America estimation based on co-operation with Consumer Trade Association (CTA)

Despite market challenges, businesses are clear on investments

Technology investments are seen as most important in the B2B space to overcome current challenges.

Investments in Digitalization and AI are leading among B2B investments.

powered by GTDC

Most important topics for B2B

80% Digitalization & AI

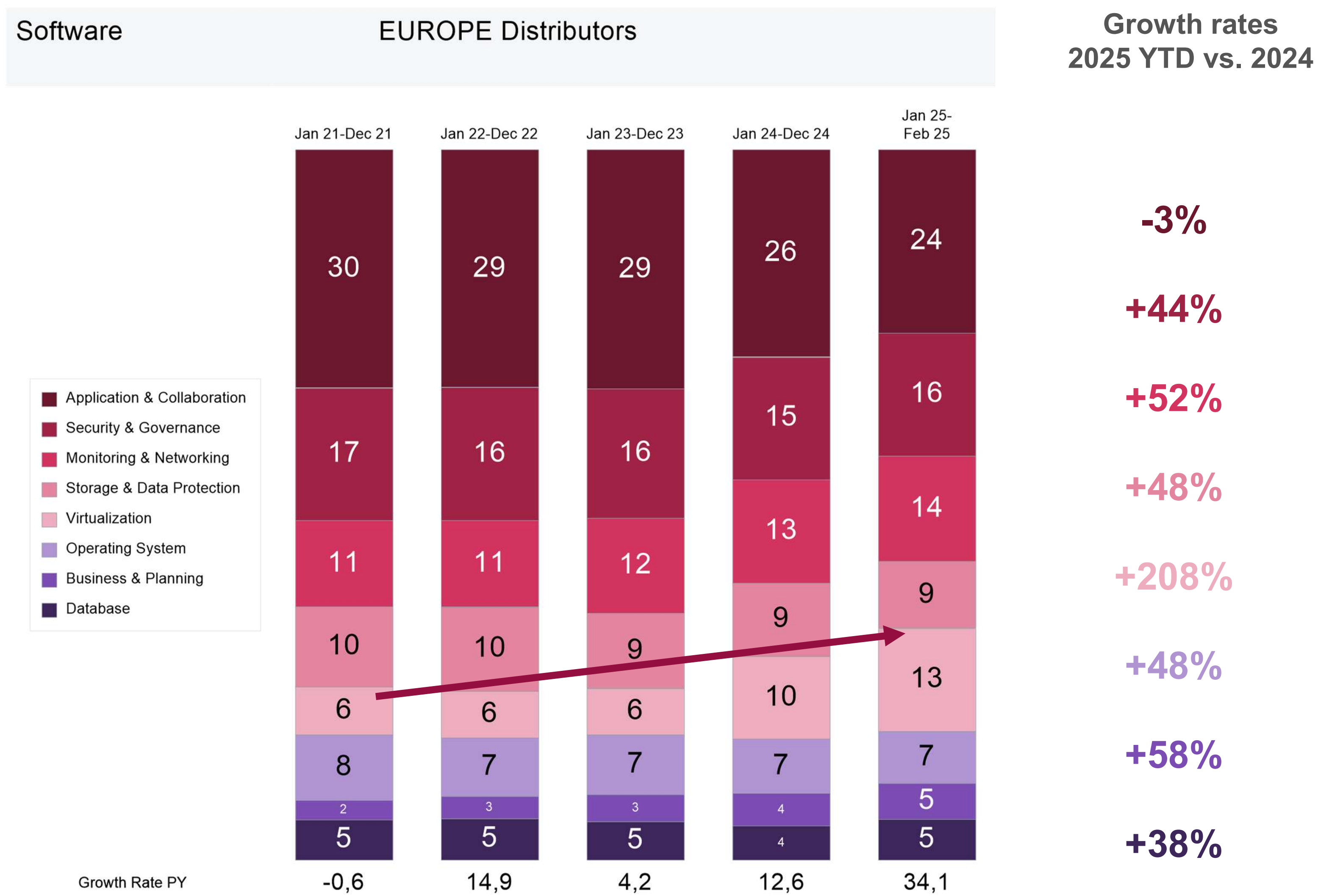
58% Cyber Security

49% Sustain-ability

GfK ITO Service Navigator, EU3

Growth story continues in Software category

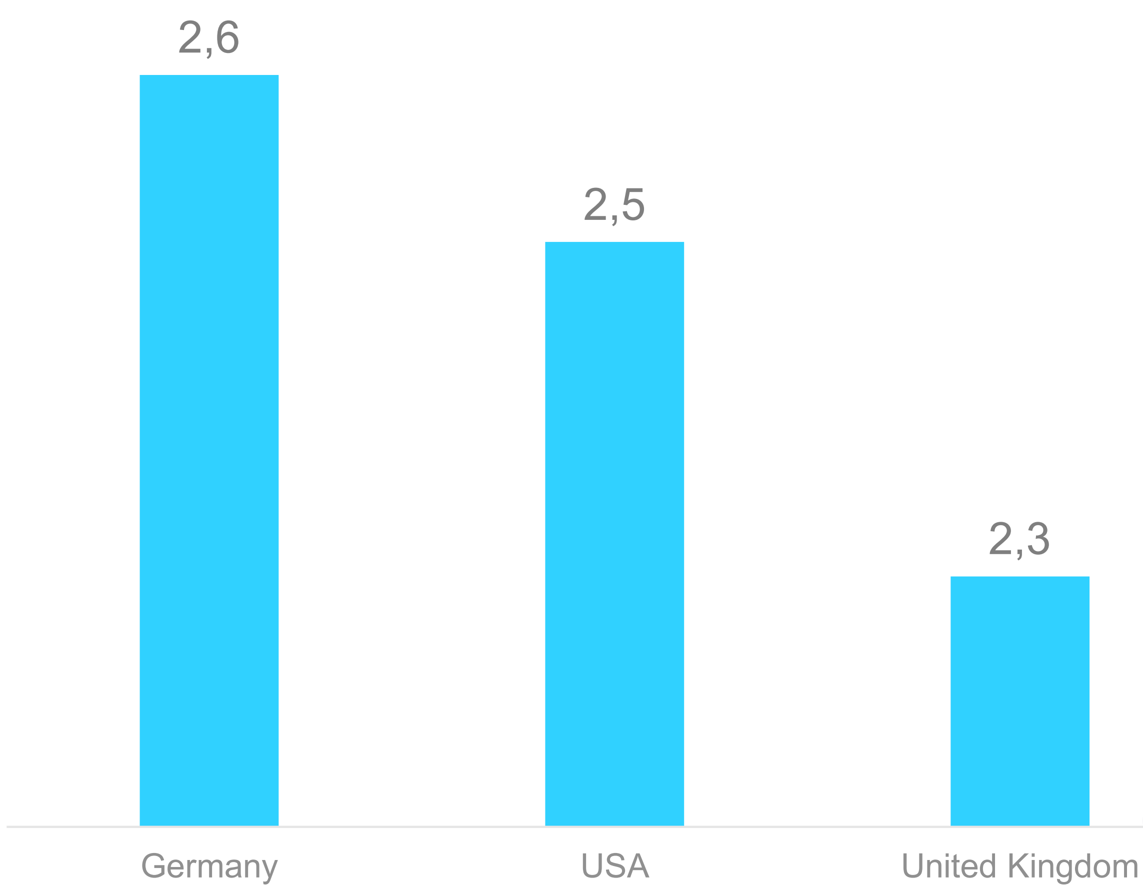
While Application & Collaboration were in demand during the pandemic, investments are now heading towards monitoring, networking & Virtualization.



AI investments

German companies are planning to invest 2,6m EUR on AI-agents in the next 12 months, even outperforming the US.

Average investment (in Million €) planned on AI-agents in next 12 months



20%

of companies plan even at **least 4m Euro** investments


25%
Missing specialists & expertise


28%
Data security concerns

What’s next?

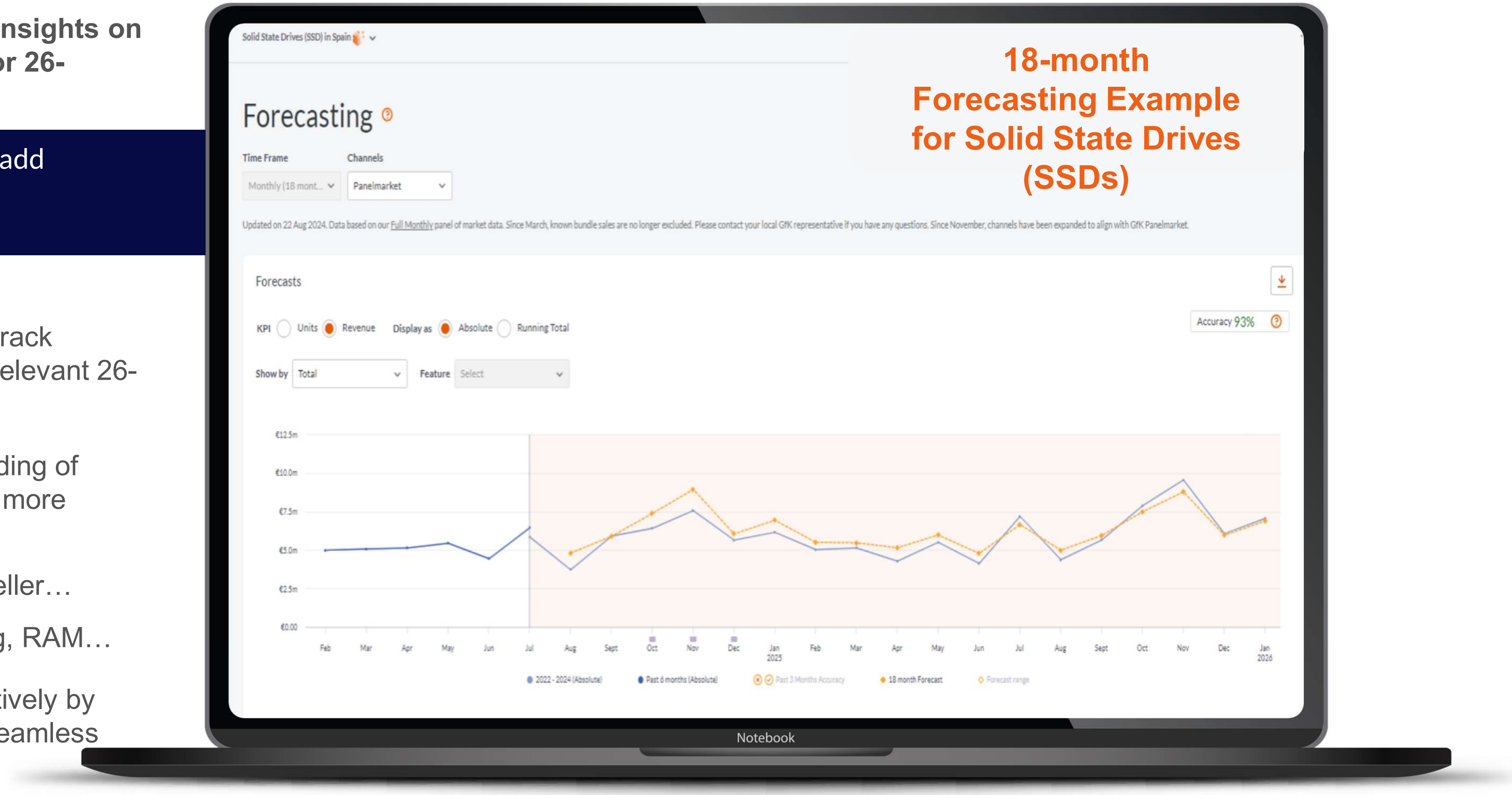
What if you could predict the next big opportunities at the Point-of-Sale before they happen?

Our POS Forecasting solution provides detailed insights on sales expectations for the upcoming 18-months or 26-weeks!

- **18 months forecast:** With our 18-month forecast, add confidence in setting targets and use our trusted forecast in brand and retailer supply planning.

- **26-Week Forecast:** For weekly data access, fast track promotions and optimize stock management with relevant 26-week forecast.
- **Segment Forecast:** Provides a deeper understanding of forecasted sales with segment forecasts, enabling more precise decision-making. For Mobile PC forecast:
  - Forecast by Channel e.g. Online, Offline, Reseller…
  - Forecast by Feature e.g. Screen Size, Gaming, RAM…
- **Export functionality:** Utilize forecasts more effectively by combining them with other data sources through seamless export functionality.

Want to learn more? [Get your free demo today!]



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Thank you

Please contact us for deep dives.

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