The future is NOW!

Future Tech Horizons & Strategies to Navigate 2025 and beyond

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NielsenIQ GfK

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

Be the shapers of tomorrow

Extract the signals from the noise & accelerate your business

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

Consumer & Shopper Intelligence

Understand consumer behaviour

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.

Master indirect sales channel with new insights

Upgrade GfK Market Intelligence with GfK Distribution Intelligence

GfK Market Intelligence

- Retail/Resell sales to end-customers (sell-out)
- Sample-based, extrapolated data
- 530.000 point-of-sales worldwide
- Available weekly, monthly or quarterly

GfK Supply Chain Intelligence

- ✓ **Combination** of Distribution (sell-through) & POS (sell-out) sales tracking
- ✓ Available for **45+ countries**
- ✓ Tracking **200 product groups**
- ✓ Detailed channel tracking with up to **21 most granular channels**
- ✓ **Speedy** reporting **on Fridays**

GfK Distribution Intelligence

- Distributor sales to Retail/Resell (sell-through)
- Live data from Leaderpanel (non-extrapolated)
- ~300 distributors worldwide
- Available weekly, monthly or quarterly

*The world's leading POS panel & largest Distributor Sales Tracking**

*Tech and Consumer durables based on country coverage and product groups | Make GfK the preferred supplier for Distribution Intelligence

Global Economies

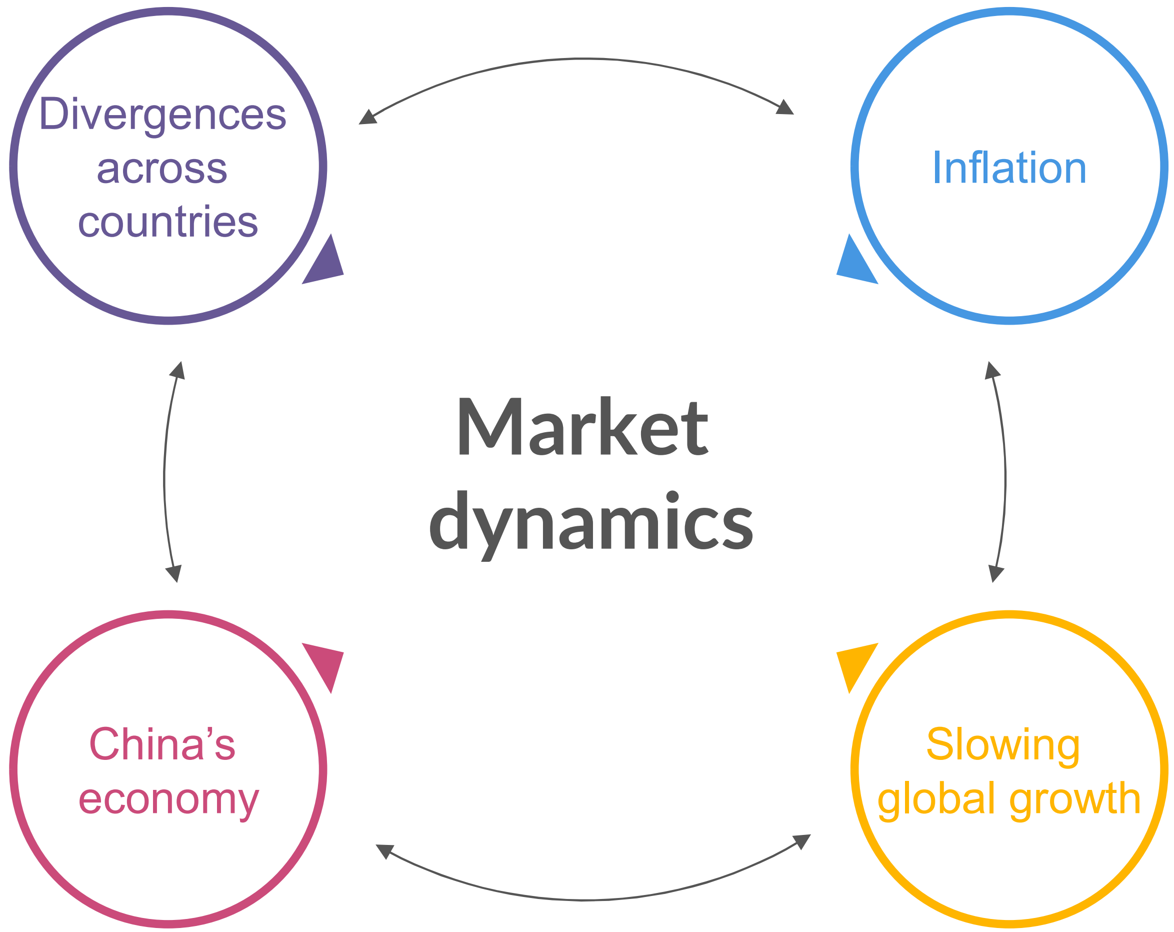
If everything seems under control,
you´re just not going fast enough.
(Mario Andretti)

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

OECD Consumer Confidence

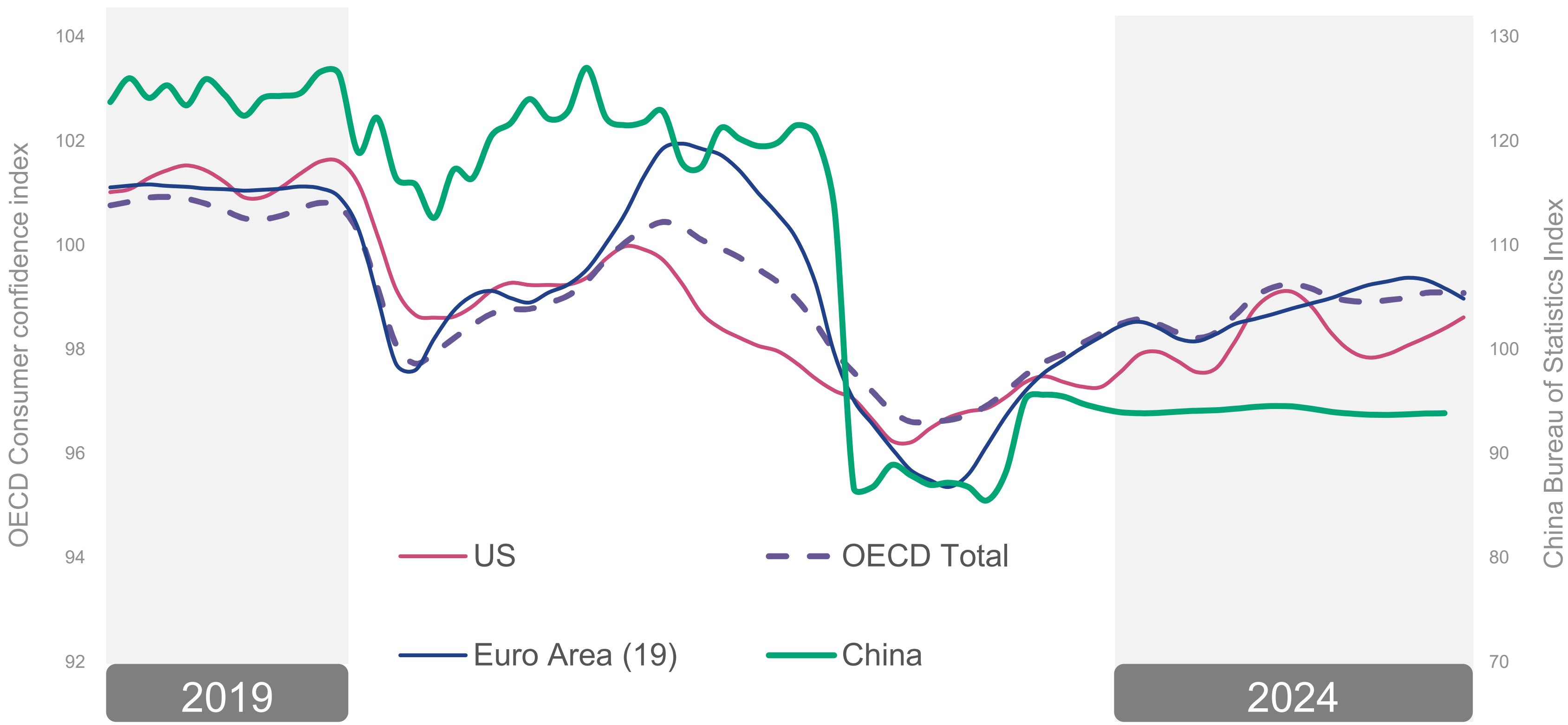
China's confidence remains low after its slump

Consumer confidence improves in Europe, and experiences an uptick in the US after a dip in July

China confidence remains low

OECD Consumer Confidence index: Amplitude adjusted*

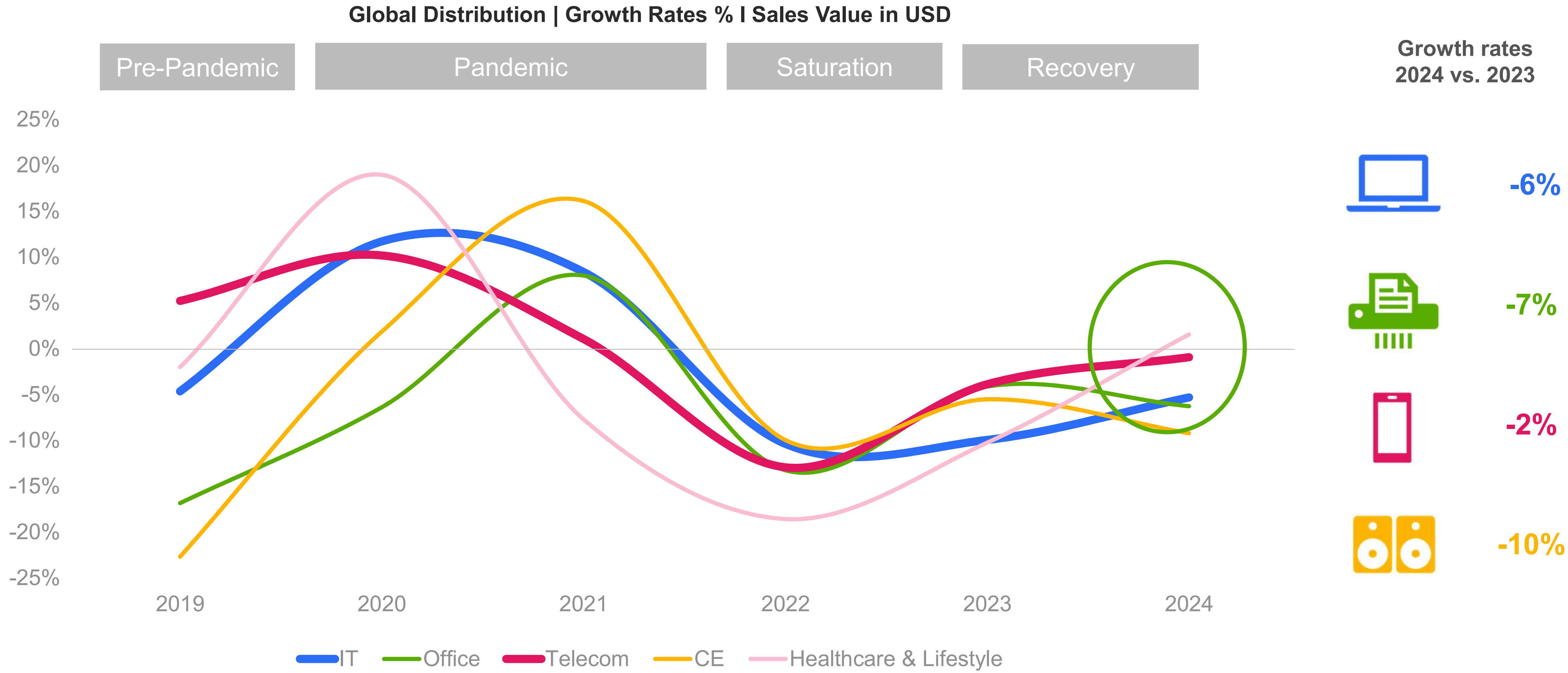
Jan 2019 – Dec 2024



Source:vOECD (2024). Accessed on 20/01/25. * Amplitude adjusted, Long-term average = 100, based on Jan 2007 to December 2024

Global Distributors show increasing sales on IT, Telecommunication & Healthcare products.

After two-digit losses in the past, IT & Telecommunication is returning to growth again.

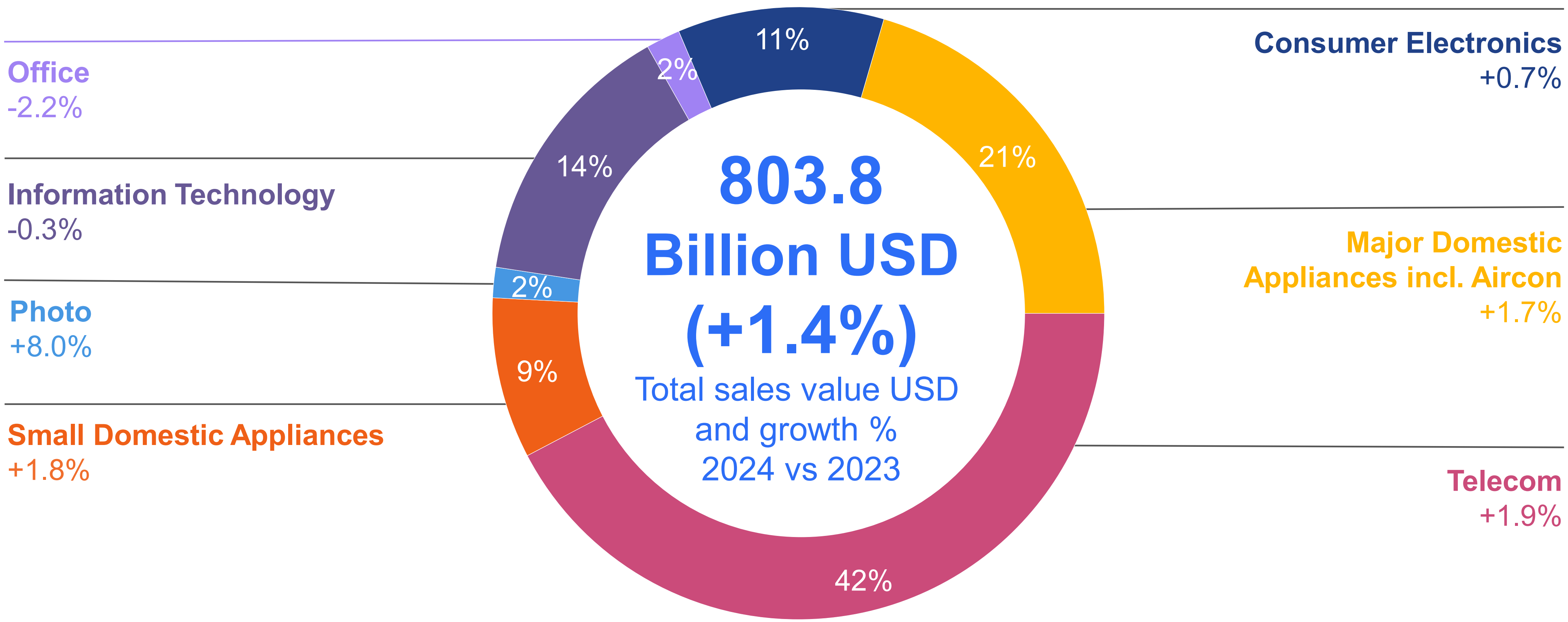


Source: GfK Market Intelligence, GfK MI Supply Chain, Global excl. RU/BY, Sales Value Growth per year

Also at the 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

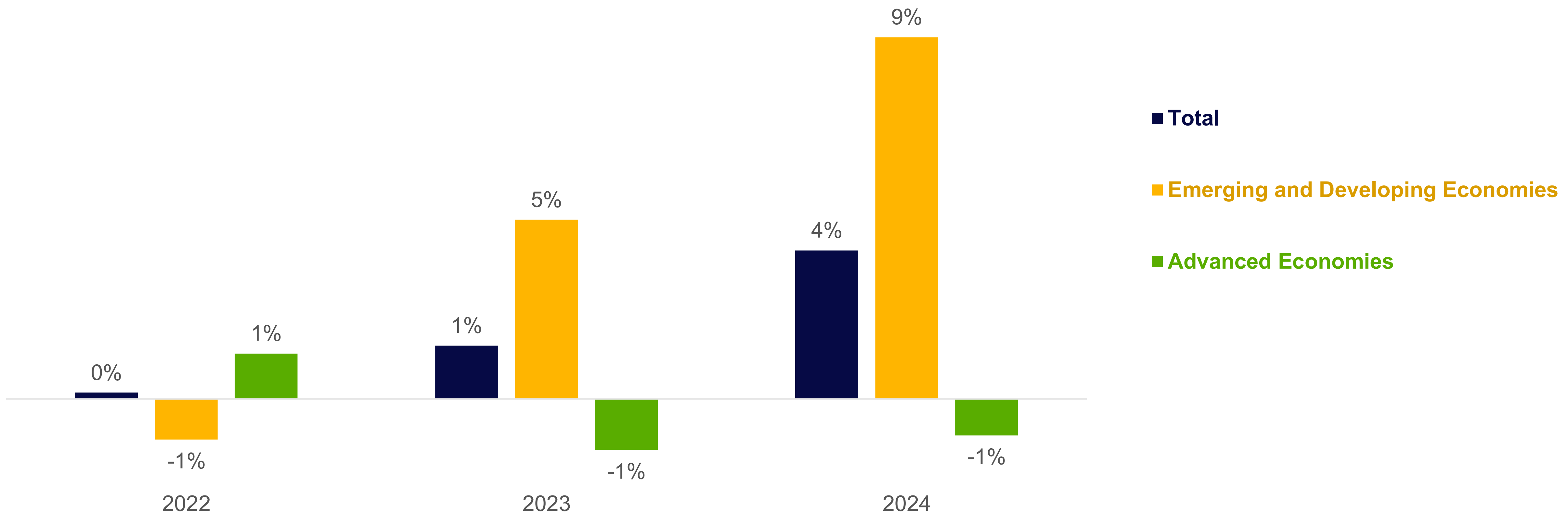


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia)

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

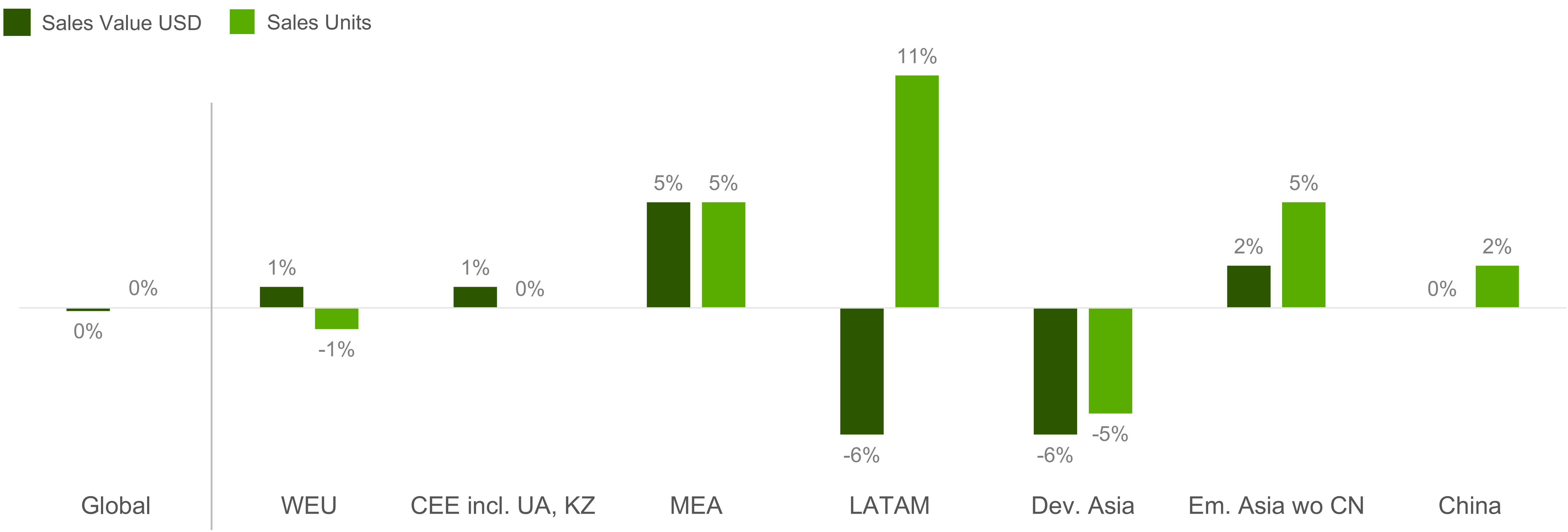


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Sales revenue growth per year vs previous year
Definition of regions is based on IMF classification
Global TCG Trends Report Q3 2024 – Global Strategic Insights

Stable global IT & Office vs. 2023

MEA, Emerging Asia and China driving growth

Global (ex. NA, RU) Point-of-Sale Markets | IT & Office | Growth rate YoY (%) | Jan 2024 – Dec 2024



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

Global Economies

- Geopolitical challenges burden markets
- Consumer Climate improves
- Signs of recovery for Tech markets
- Emerging markets leading the way

Strategy #1:

Adapt, but quickly

Risks		Present		Future
Deglobalization Protectionism Tariffs Wars Supply Chains	›	Recovering, but cautious Market Demand Emerging vs. Developed markets	›	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

Navigating AI in Tech & Durables

By Ines Haaga

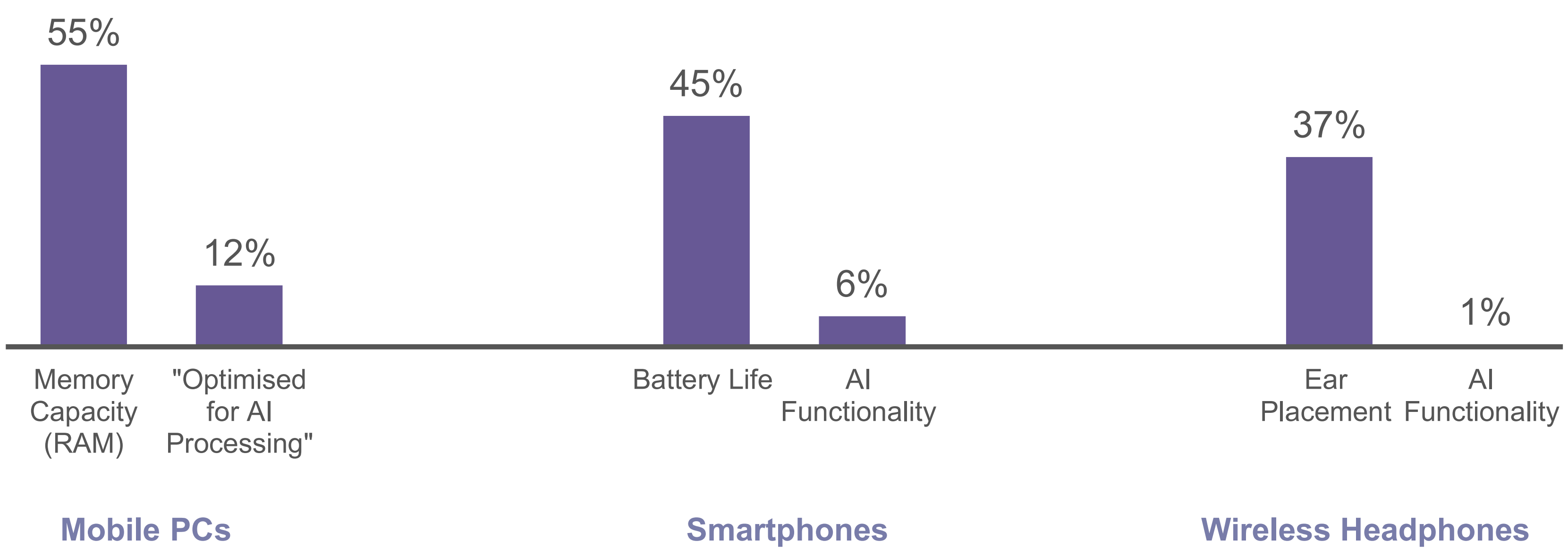
Learn more in & from our workshops!

Source: [Bain & Company]

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

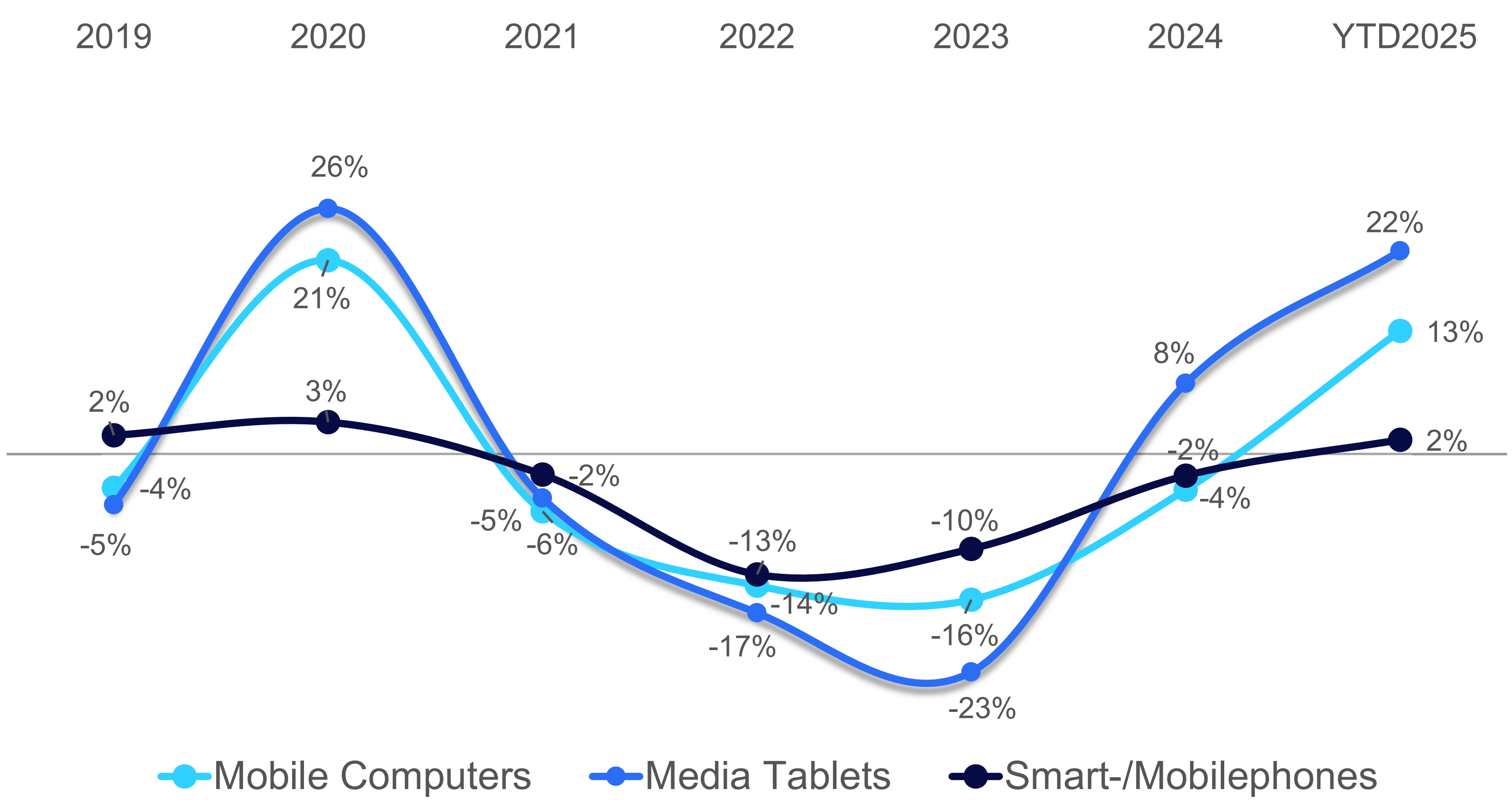


Source: gfknewron Consumer; Choice Drivers per category; Q2 2024. Countries: AT, BE, BR, CL, FR, DE, GB, GR, ID, IT, JP, NL, PL, ES, CH, TR

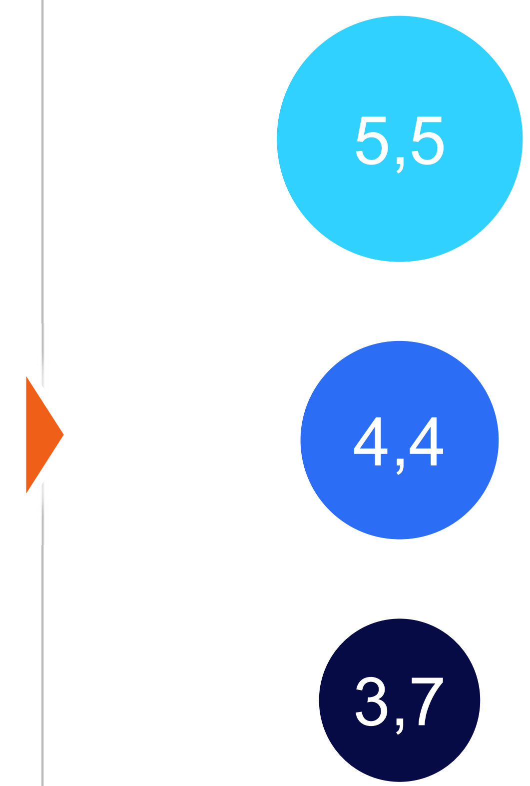
gfknewron reveals: 2025 will be the year of replacements!

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



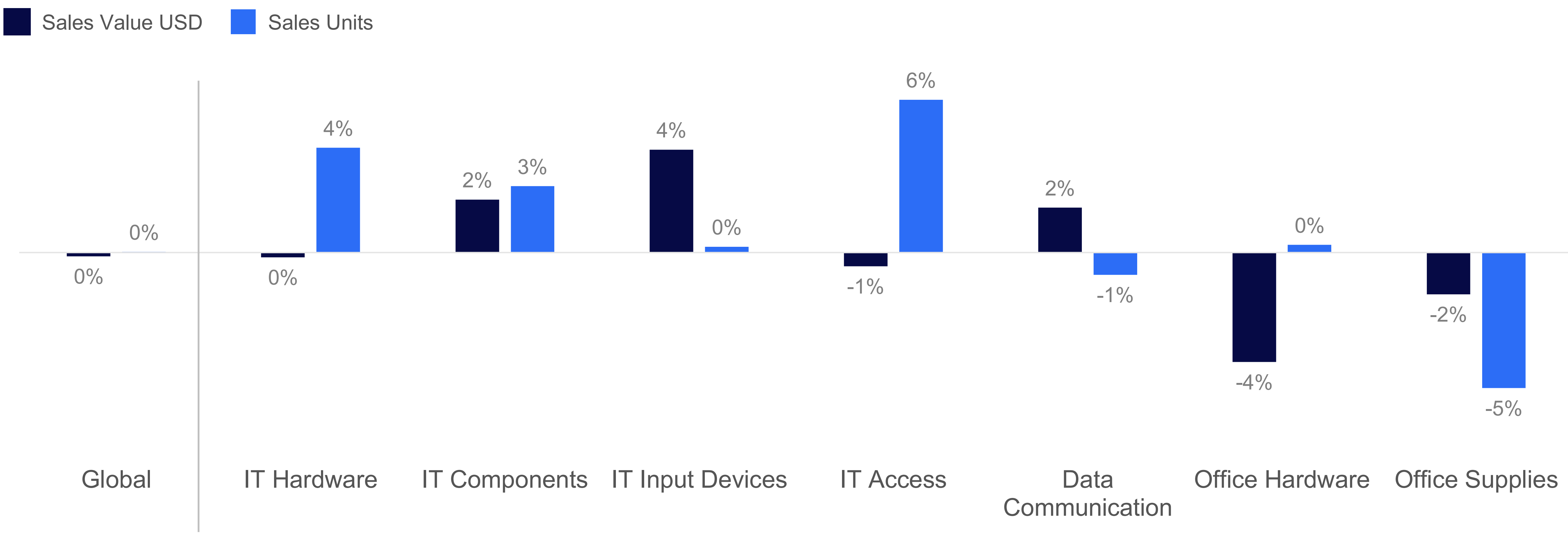
Source: GfK MI Supply Chain, Global excl. RU/BY and APAC, Sales Unit Growth per year until 2025 (Jan)

Source: gfknewron Consumer, Av. Age of previous product

IT Hardware and Accessories Drive Growth Amid Selective Spending

Hardware grows in units thanks to monitors and media tablets sales

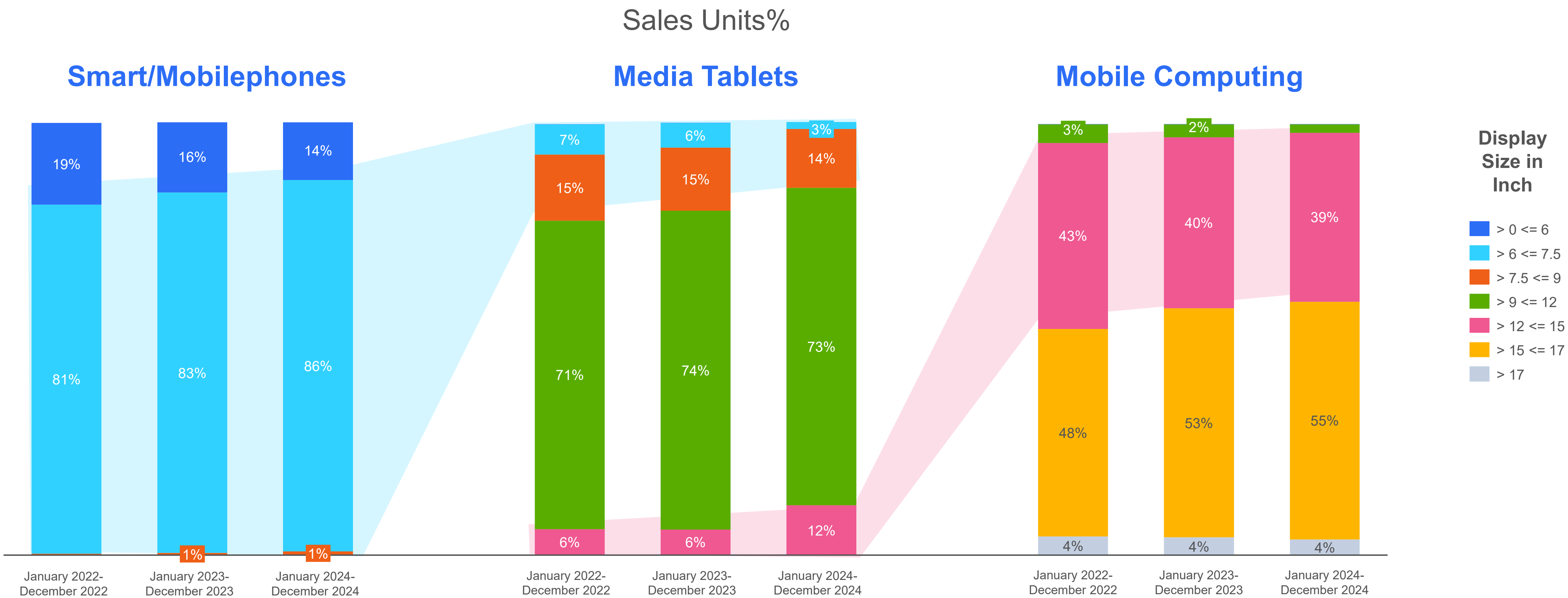
Global (ex. NA, RU) Point-of-Sale Markets | IT & Office | Growth rate YoY (%) | Jan 2024 – Dec 2024



Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Retail Channels | Global includes a total of IT hardware, IT components, IT input devices, IT Access, Data Communication, Office Hardware & Office Supplies

Shifting Screen Preferences Reshape the Device Market

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

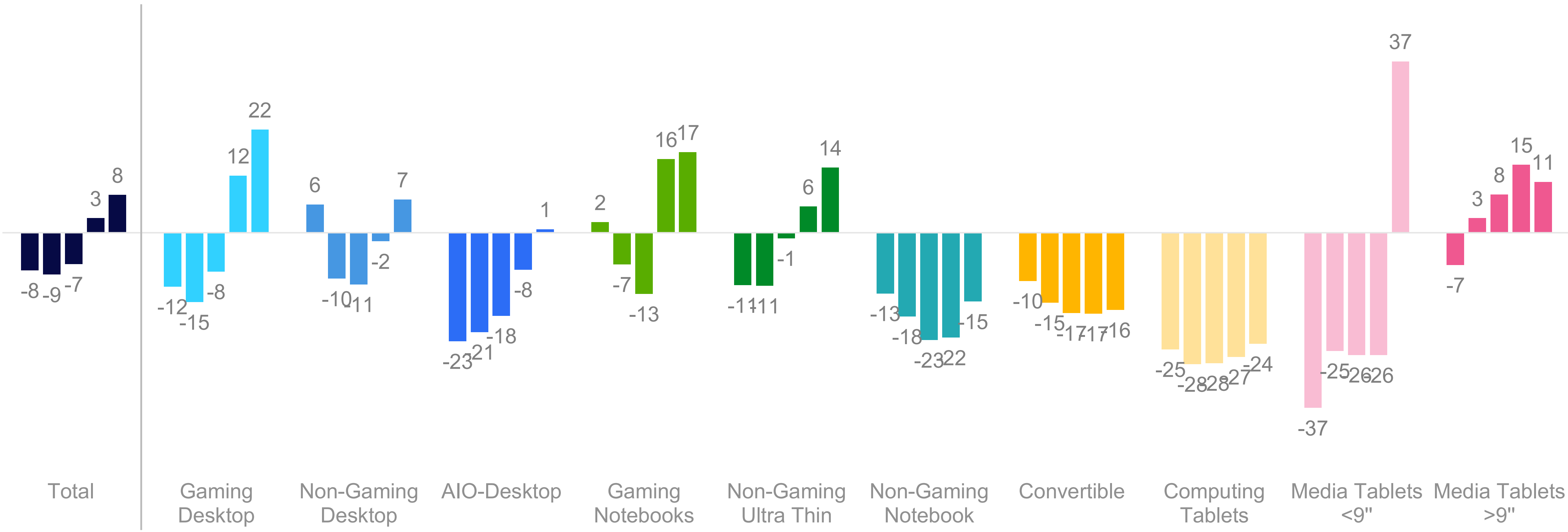


Source: GfK Market Intelligence; Global wo NA/RU

Growth driven by Gaming, Ultra Thin and Media Tablets

For Media Tablets, stronger growth in Units compared to revenue

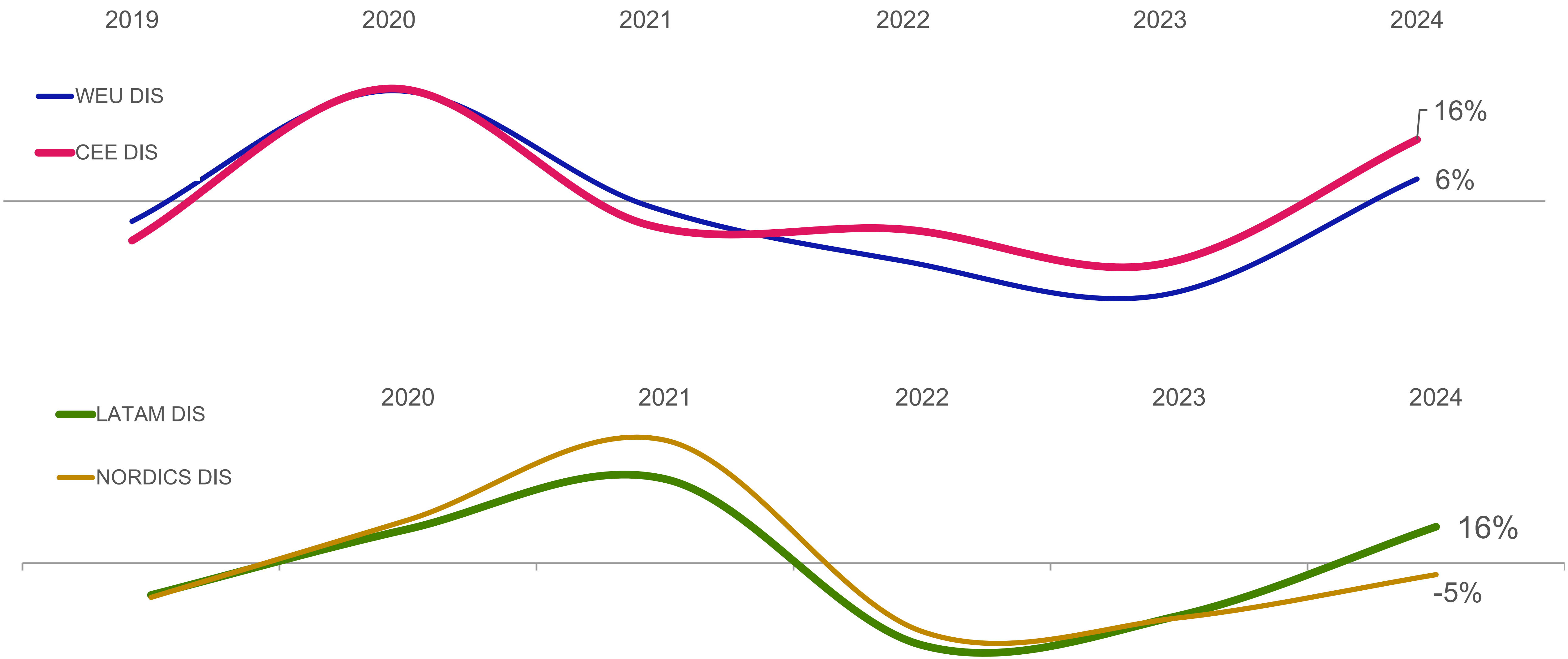
Global (ex. NA, RU) Point-of-Sale Markets | IT & Office categories | Growth rate by quarter (%) | Q4 2023 – Q4 2024



Source: GfK Market Intelligence; Global (excl. NA, RU) coverage; retail channels; Revenue Growth in USD (NSP) compared to previous year's quarter; Q4 2023 – Q4 2024

Also for Mediatablets, emerging markets outperform developed regions

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



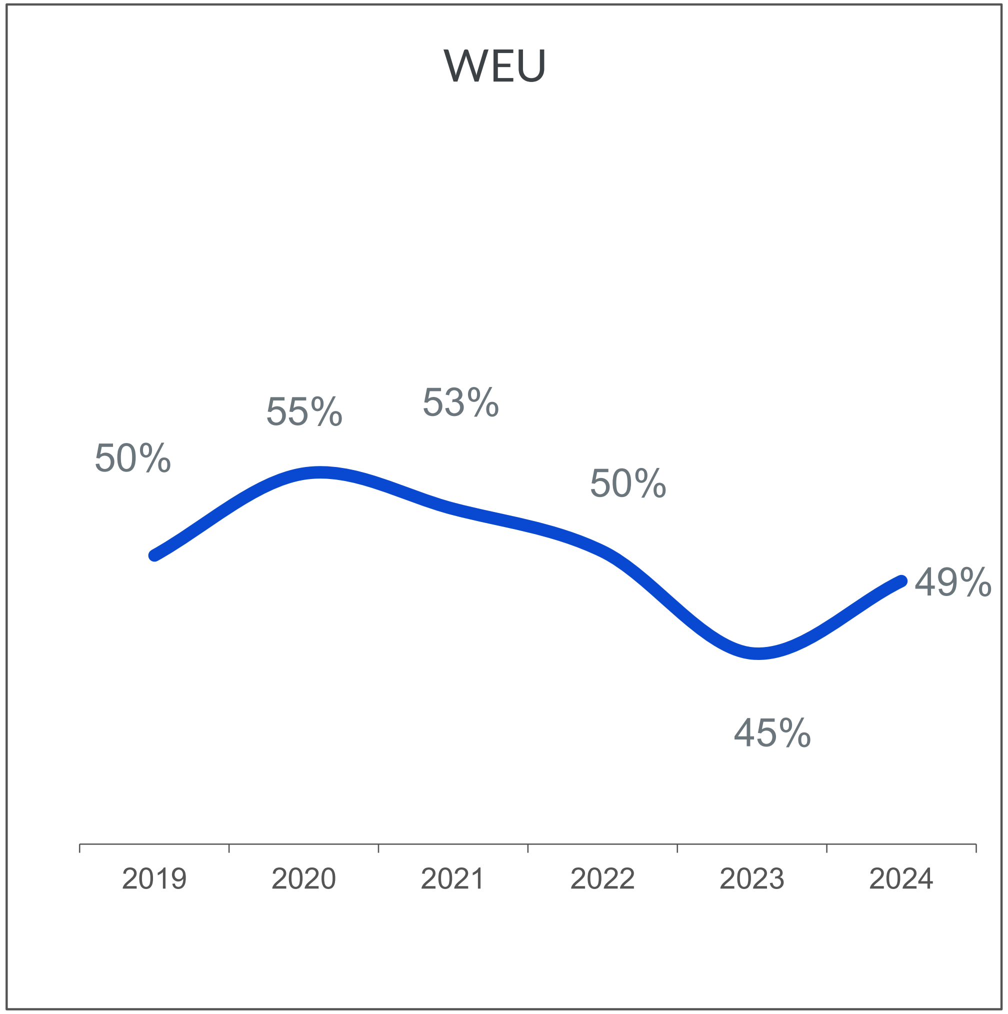
Source: GfK Market Intelligence, GfK MI Supply Chain, Global excl. RU/BY and APAC, Sales Unit Growth per year

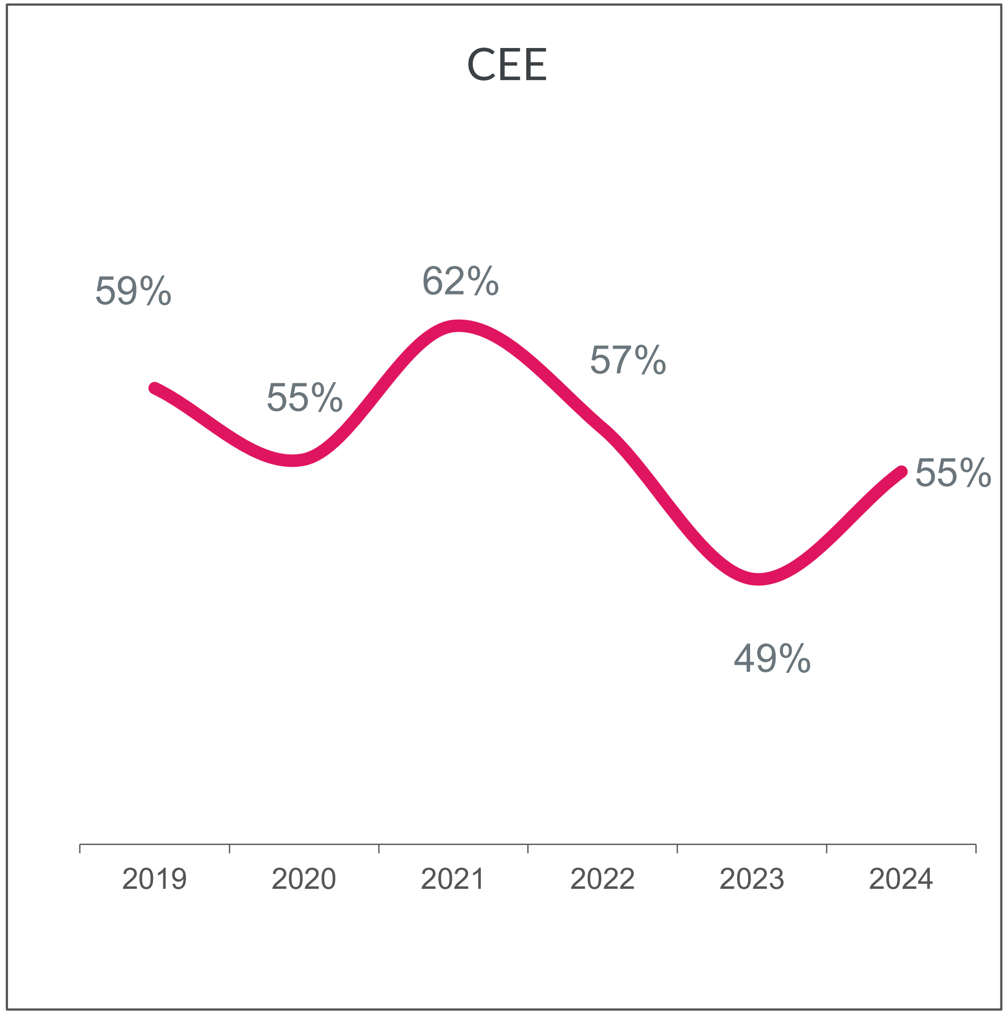
But to be successful across markets, you also need to understand sourcing patterns.

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

Growth Areas

- AI with potential to significantly uplift IT markets but barriers to be overcome
- Replacements to be fully leveraged in 2025
- IT Hardware & Accessories benefitting especially
- Gaming, Ultrathin & MediaTablets among major winners
- Understanding Supply Chains & having the right partners is vital for success!

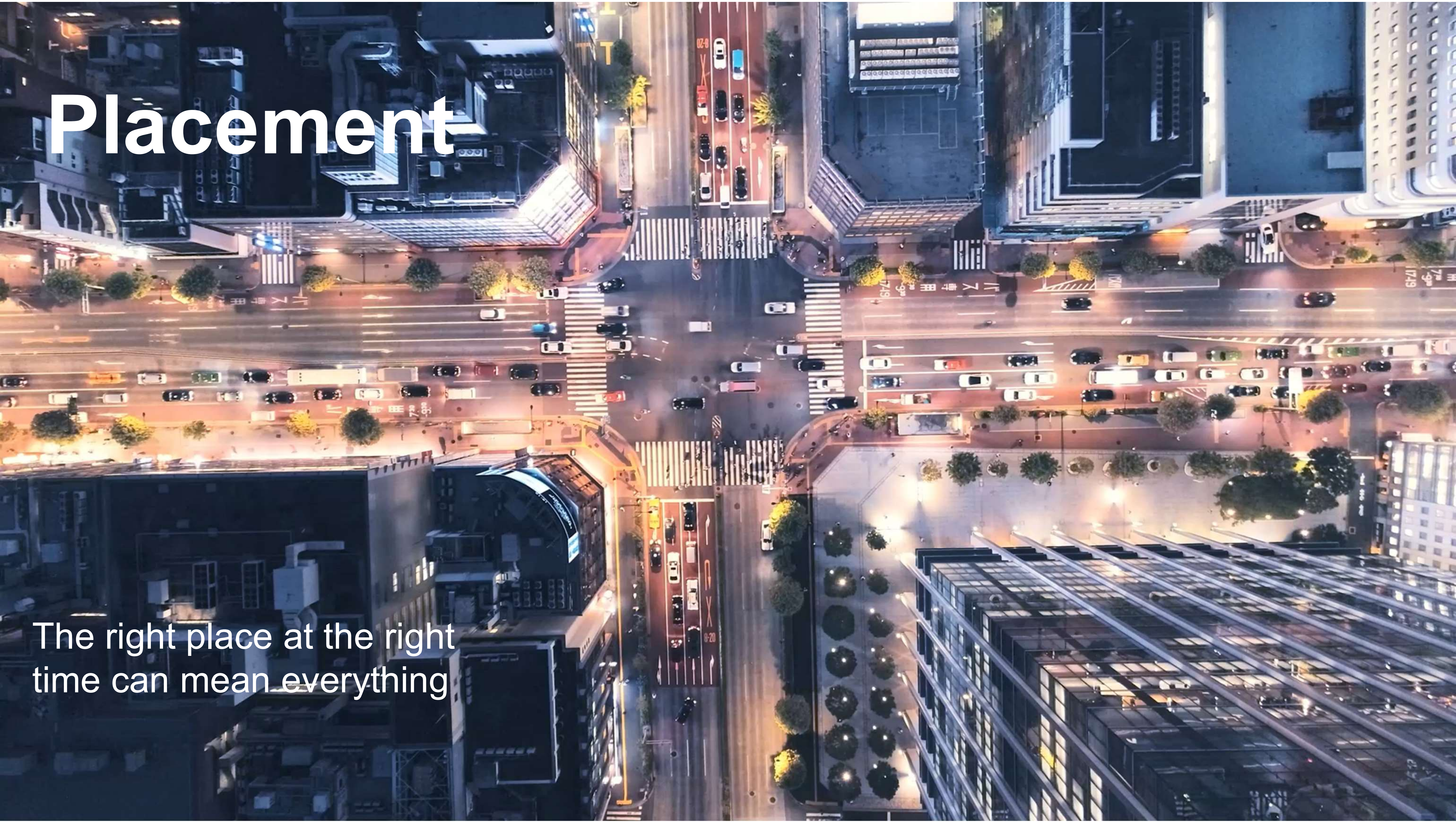
Strategy #2:

Be prepared

Risks	Present	Future
Consumer preferences Unclear product value Security Concerns Price Sensitivity	Beginning Replacement cycles Early stage of AI	Aligning with Consumer Demands

Mitigate risks by data-driven business decisions

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



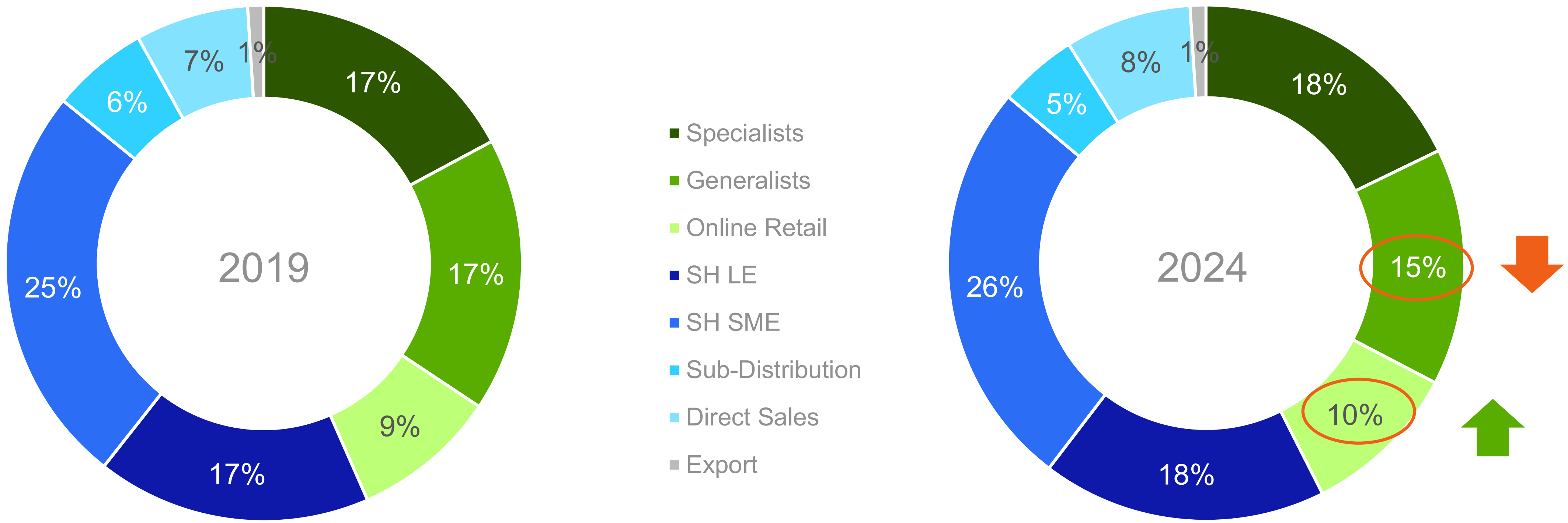
Placement

The right place at the right
time can mean everything

Distributors higher sales to Specialists & Online Retailers at the expense of Generalists.

After high online sales during pandemic and dip afterwards, revenue with E-Tailers is picking up again.

Global (ex. NA, RU/BY, APAC) Distribution Markets, Tech and Durables | Sales Value (NSP) USD share (%) | FY 2019 vs. 2024

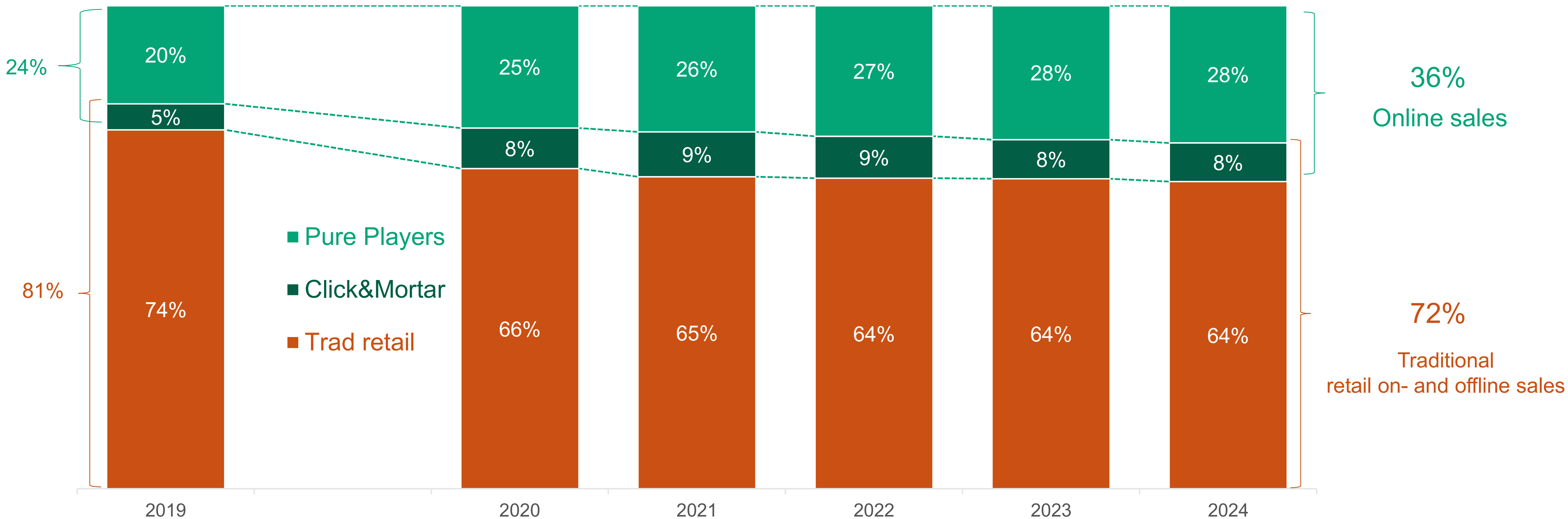


Source: GfK MI: Supply Chain, Global excl. RU/BY, Sales Value in USD, all channels & product groups, Periods until January 2025

Our Point-of-Sale Data reveals: Share increase, driven by pure players

Online sales of traditional retailers lose ground gained during pandemic since 2022

Global (ex. NA, RU) Tech and Durables | Sales Value (NSP) USD share (%) | Jan 2024 – Dec 2024

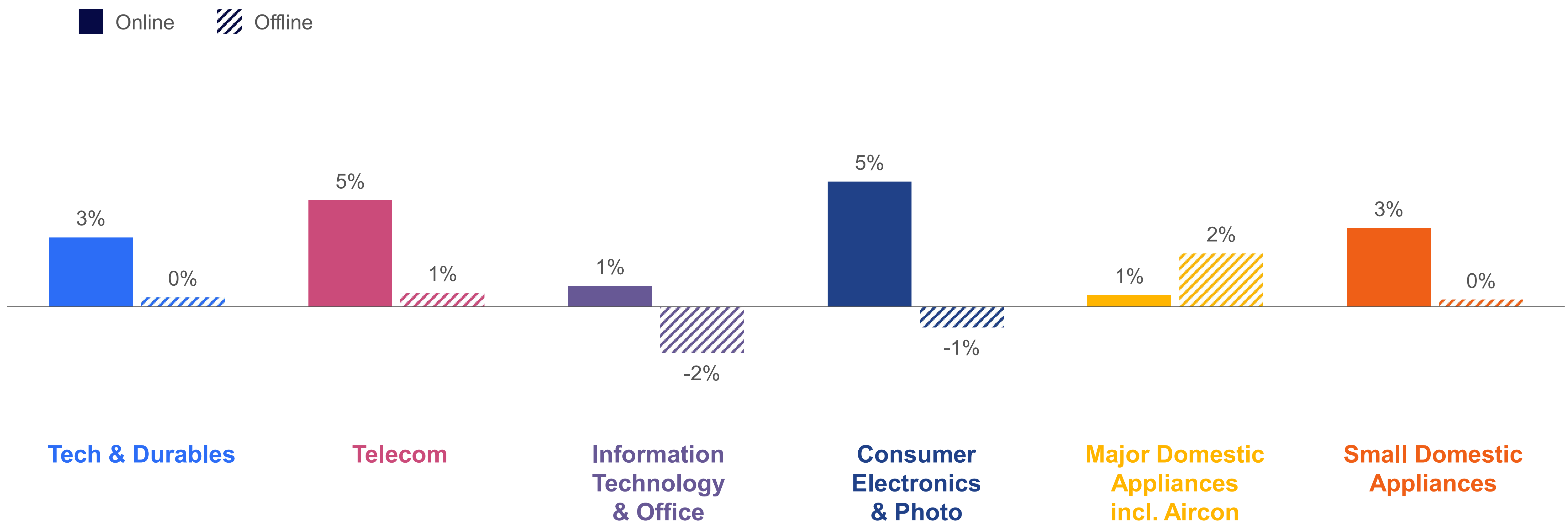


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Sales revenue growth 2024 vs 2023
Ecommerce Evolution – Global Tech & Durables FY 2024 Report

Online performance comparatively better than offline with an exception of MDA

Growth trend returns to pre-pandemic levels

Global (ex. NA, RU) Tech and Durables | Growth rate YoY (%) | Jan 2024 – Dec 2024

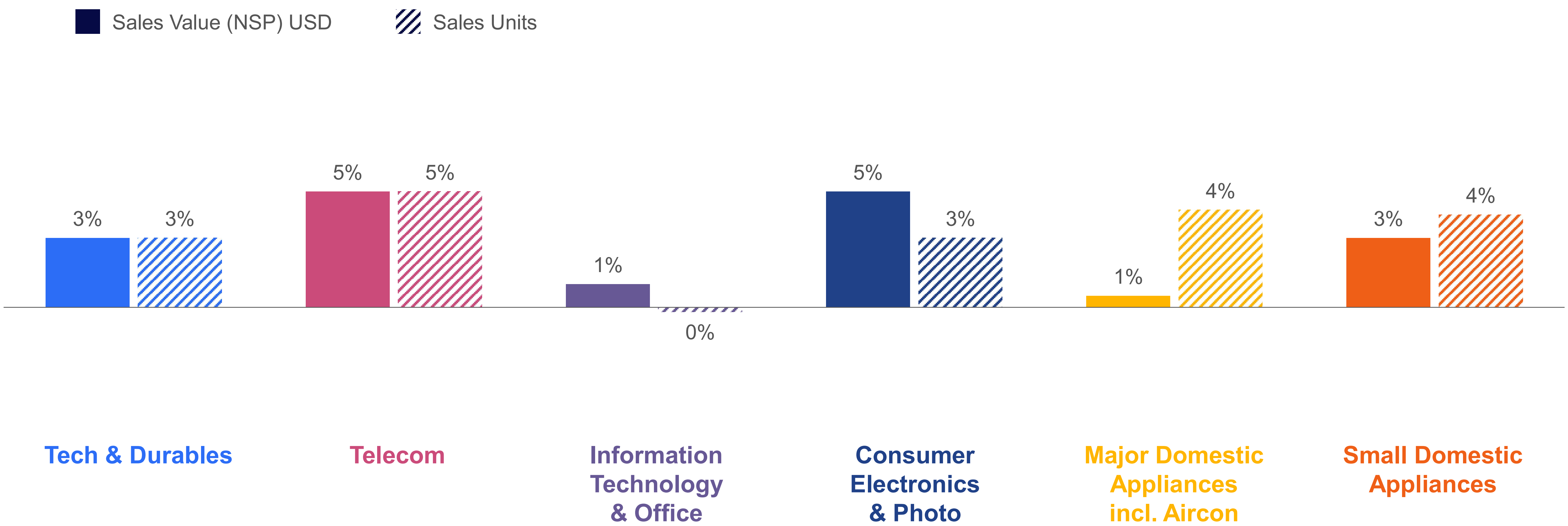


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Sales revenue growth 2024 vs 2023
CE includes Multifunctional Technical Devices and SDA includes Personal Diagnostics
Ecommerce Evolution – Global Tech & Durables FY 2024 Report

CE and IT units' growth lower than revenue growth

All other sectors unit performance better than revenue performance

Global (ex. NA, RU) Tech and Durables | **Online Channel** | Growth rate YoY (%) | Jan 2024 – Dec 2024

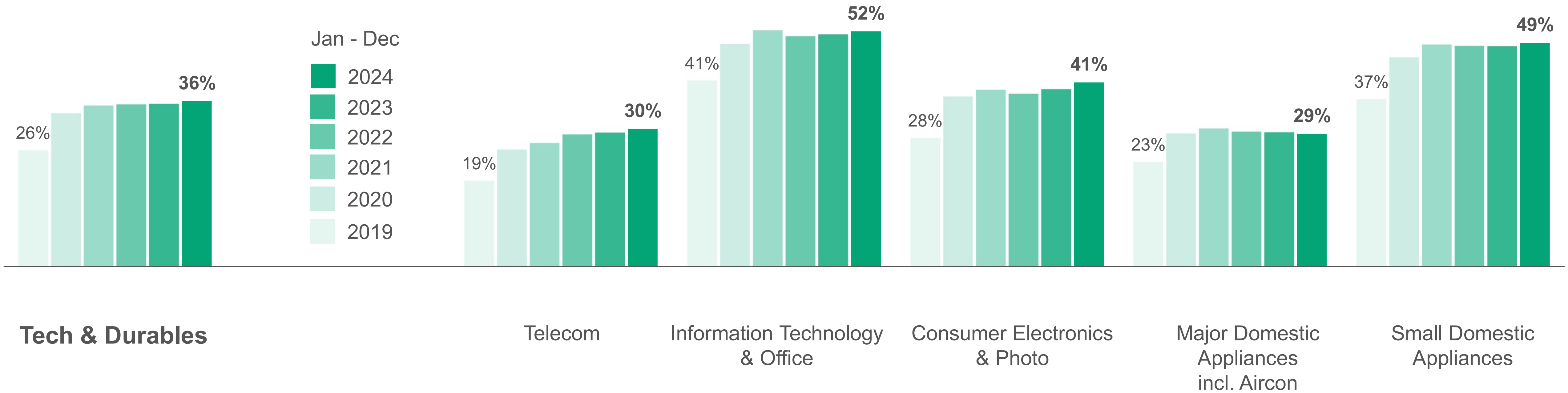


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Sales revenue growth 2024 vs 2023
CE includes Multifunctional Technical Devices and SDA includes Personal Diagnostics
Ecommerce Evolution – Global Tech & Durables FY 2024 Report

Slight wins across all sectors except MDA

Growth trend returns to pre-pandemic levels

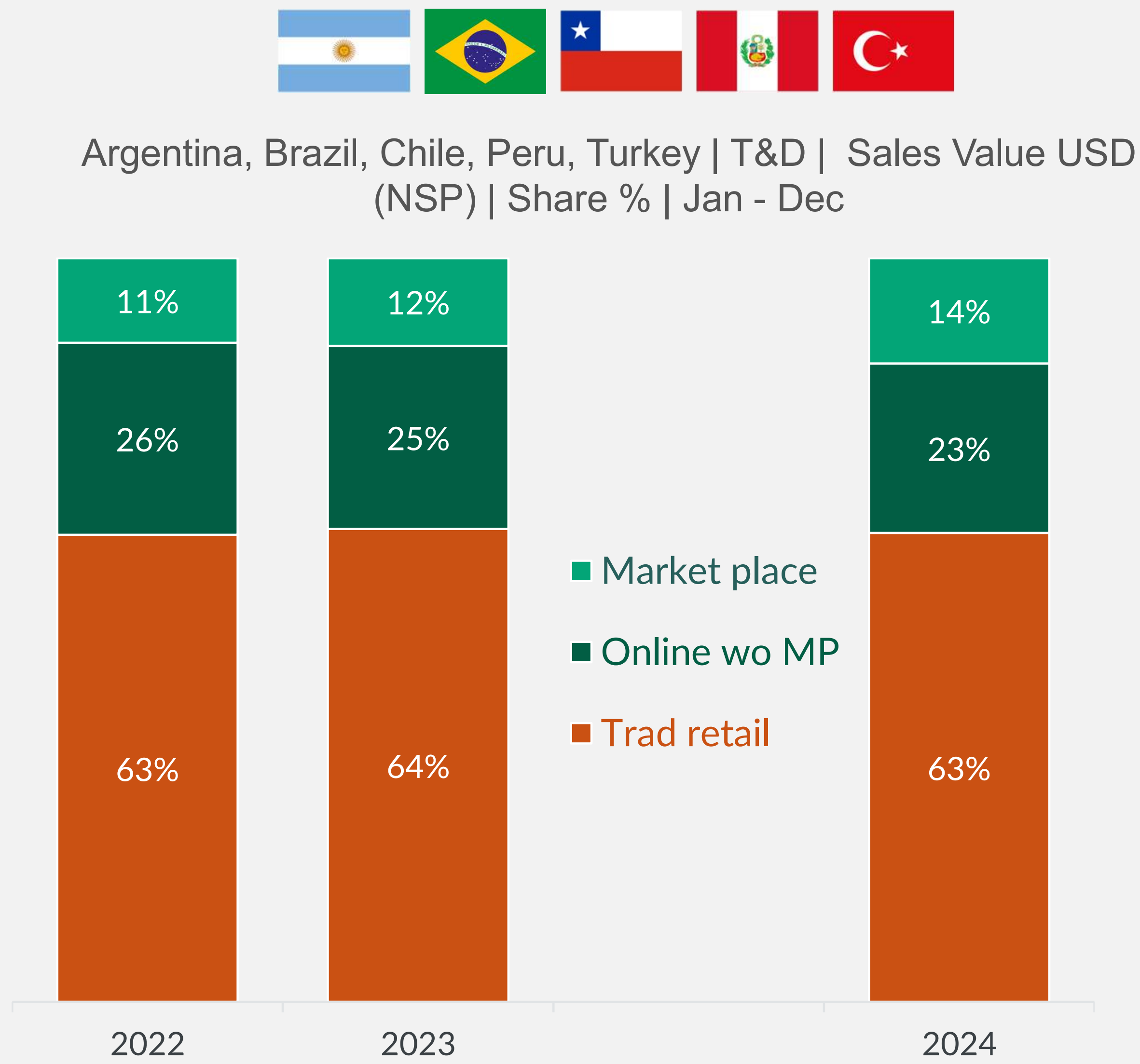
Global (ex. NA, RU) Tech and Durables | **Online channel** | Sales Value USD (NSP) share (%) | Jan 2024 – Dec 2024



Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Sales revenue growth 2024 vs 2023
CE includes Multifunctional Technical Devices and SDA includes Personal Diagnostics
Ecommerce Evolution – Global Tech & Durables FY 2024 Report

Marketplaces *grow in relevance*, expanding across regions & channels

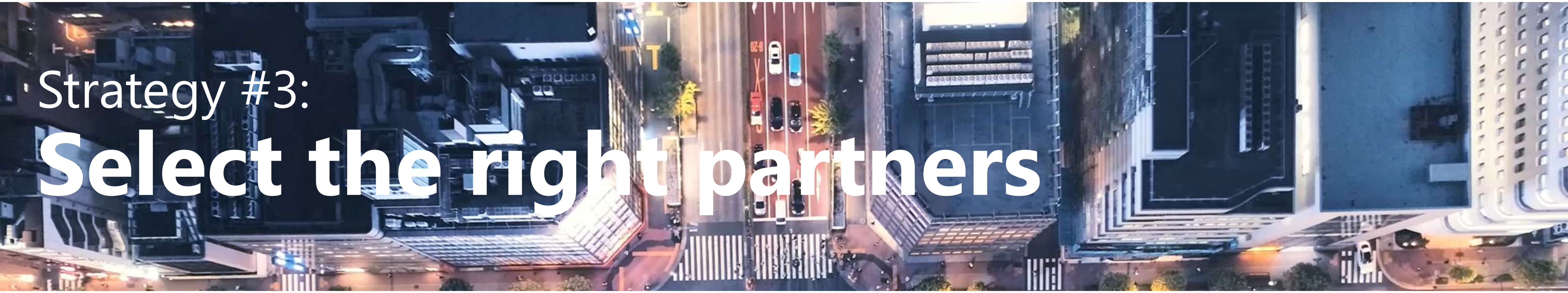
3P sales share grows within online channel



Source: GfK Market Intelligence: Sales Tracking
Ecommerce Evolution – Global Tech & Durables FY 2024 Report

Placement

- Changing channel dymanic in distributors´ revenue
- Online continues growth story
- PurePlayers increasingly expand in shares
- Online product performance exceeding traditional stores in 2024
- Importance of online sales esp. For IT & Consumer Electronics
- Marketplaces growing in relevance



Strategy #3:

Select the right partners

Risks	Present	Future
Shifting channel dynamics Continuous growth online Margins Loss of customer proximity	Online expansion Marketplaces	Rethink Retail

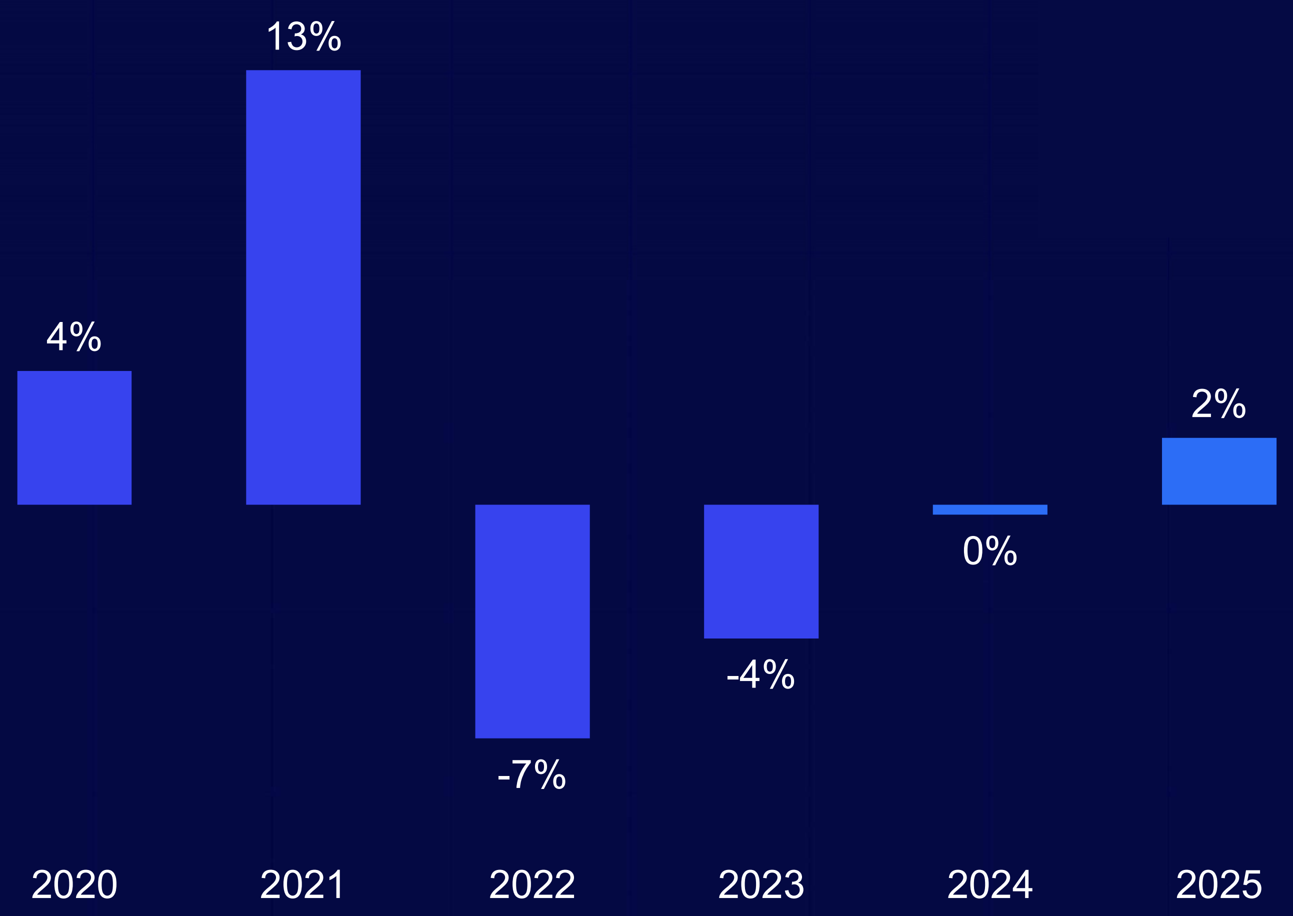
Mitigate risks by data-driven business decisions

- Understand for which categories & products online is essential
- Rethink retail for traditional stores with AI as accelerator:
  - From customer support to customer care
  - Create offline value & experience

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)


The Future
is Now!

Thank you!

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