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Helicopter View Report for the tech industry

Get the big picture of your tech & durable goods markets: quarterly sales insights from across the globe

EDITION Q2 / 2025

Powered by Global Strategic Insights

I truly believe that it would be impossible to succeed in our business without the NIQ point of sales market data."

Heiko Erhard

Marketing Strategy and Planning Sony (2020)

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GfK Market Intelligence: Sales Tracking

Strategize with the world's largest and most up-to-date sales tracking database, specializing in the Tech & Durables sector.

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With GfK's Sales Tracking data, you're not just following the market – you're leading it.

Benefit from monthly or weekly data and insights

- Get insights that inform every level of decision-making. Whether it's optimizing your assortments, pricing strategies, or promotional planning, we help you turn data into actionable strategies.
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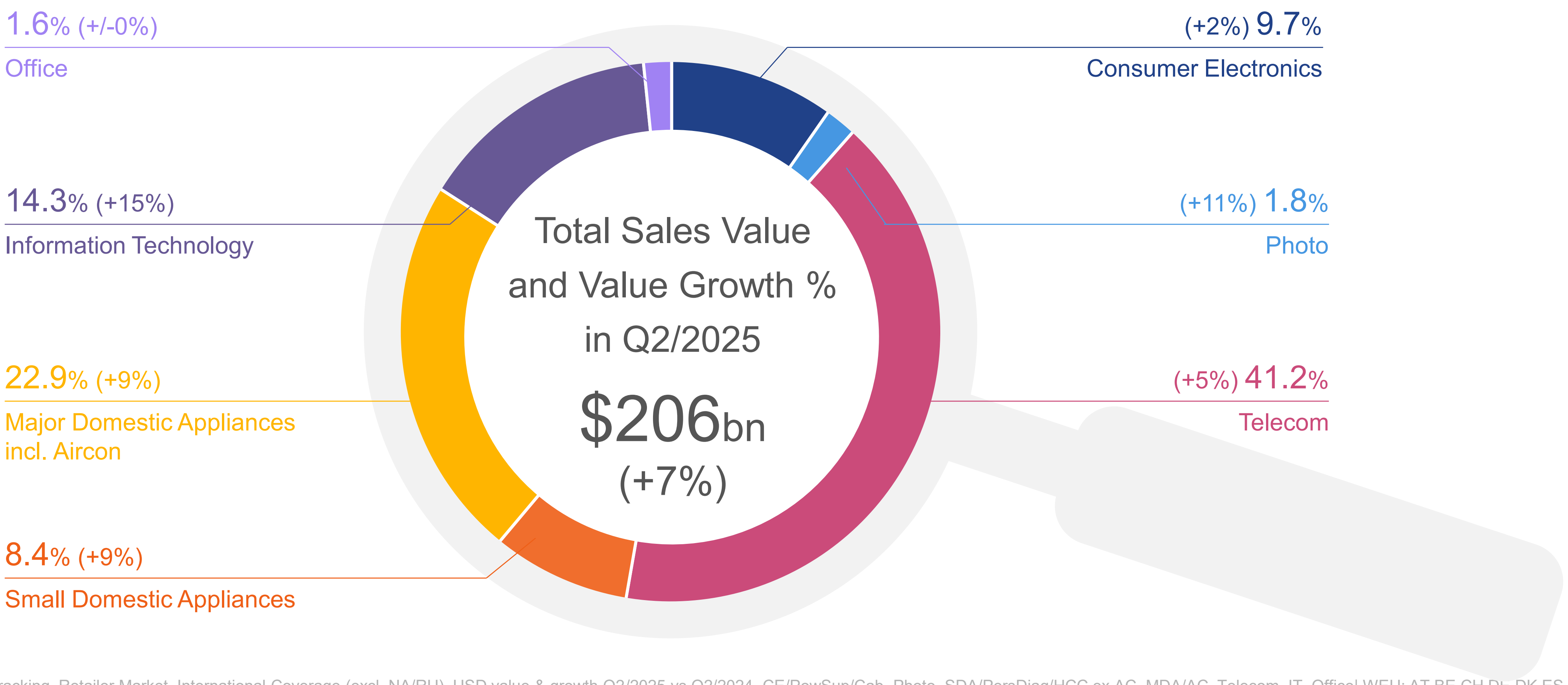
Tech & Durables total market returned to growth, driven by subsidies and replacement purchases.

Sales value USD value shares & growth / Q2/2025



Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office| WEU: AT BE CH DE DK ES FI FR GR IT LX NL NO PT SE UK | EEU: CZ HR HU KZ PL RO RS SI SK UA | META: AE EG IL IQ MA OM PK SA TR ZA | APAC ex CN: AU NZ HK ID IN JP KH KR MM MO MY PH SG TH TW VN | Latam: AR BR CL CO CR EC GT HN PA PE

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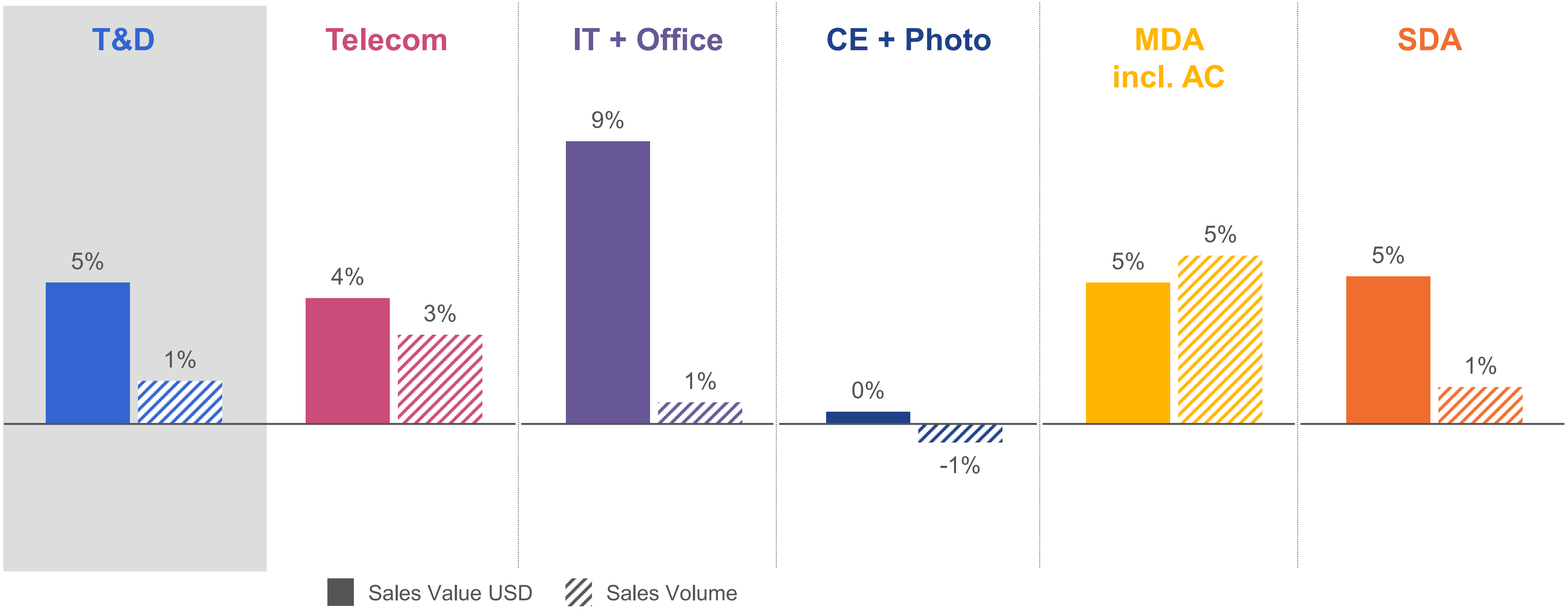
Value was back to growth ahead of volume, primarily driven by IT/OE replacement cycles. Domestic appliances continued to perform well.

Sales value USD & volume growth % / YTD 2025



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Most emerging regions drove value growth. Most regions except Developed Asia returned to growth.

Sales value USD value & growth / YTD 2025

Global (excl. NA/RU)

Value YTD	**$403bn**
Growth rate	**+4.6%**

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office| WEU: AT BE CH DE DK ES FI FR GR IT LX NL NO PT SE UK | EEU: CZ HR HU KZ PL RO RS SI SK UA | META: AE EG IL IQ MA OM PK SA TR ZA | APAC ex CN: AU NZ HK ID IN JP KH KR MM MO MY PH SG TH TW VN | Latam: AR BR CL CO CR EC GT HN PA PE

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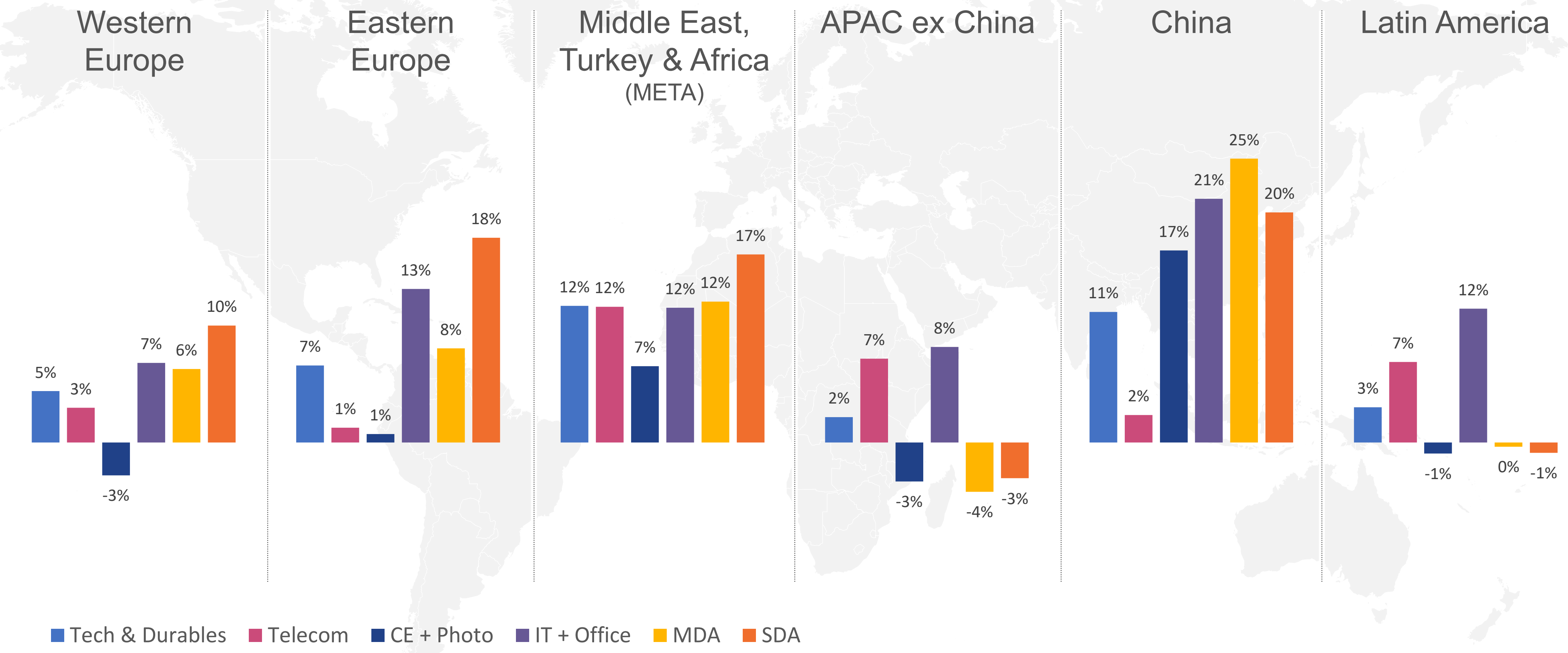
The subsidy program in China resulted in strong local demand, uplifting the total trend. IT demand boomed due to replacement cycles.

USD growth % YoY Q2/2025



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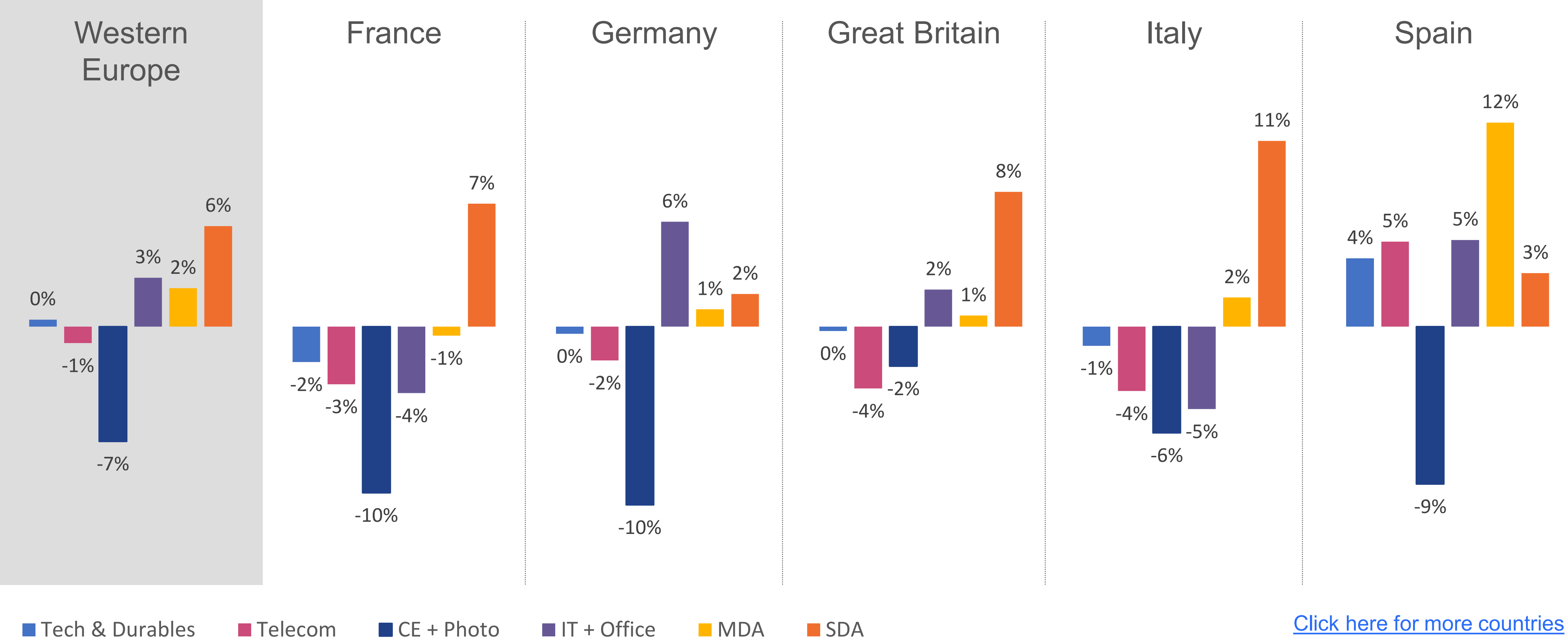
SDA continued to outperform. CE/Photo experienced declines. Spain was a notable exception in Telecom.

Western Europe
Contact person:
Erol Sukan
(MI Lead)
Erol.Sukan

EUR growth % YoY Q2/2025



Click here for more countries

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | WEU: AT BE CH DE DK ES FI FR GR IT LX NL NO PT SE UK

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Helicopter View Western Europe

Western Europe

Contact person:
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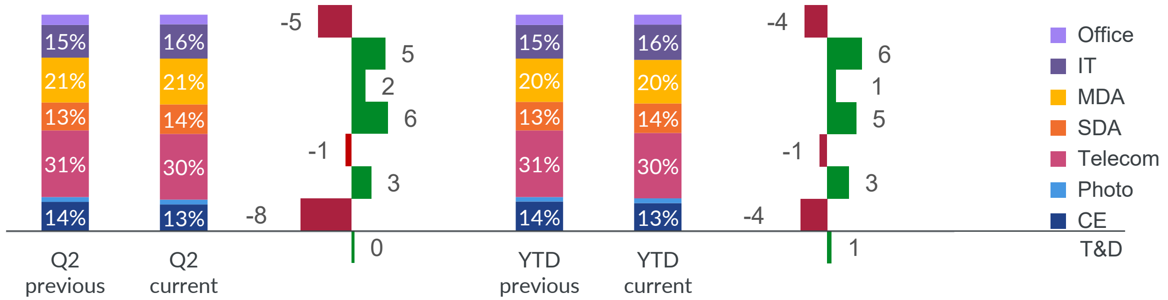
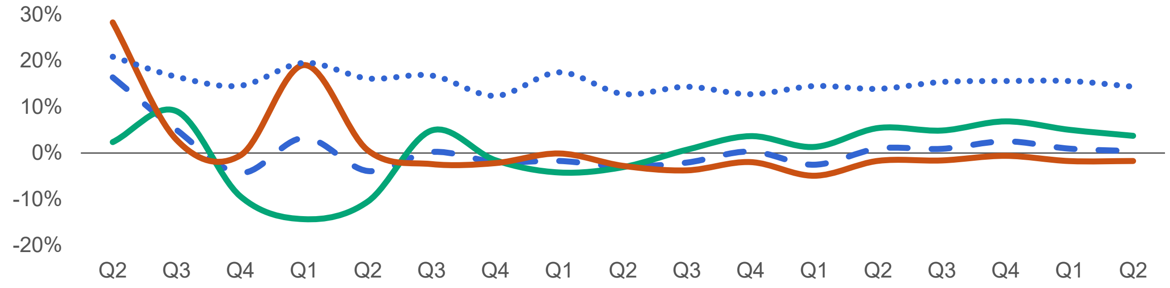
(MI Lead)

Erol.Sukan

Consumer basket and spending (value EUR) for tech & durable goods (T&D), YoY growth %



Retail sales (value EUR) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- In Western Europe, the Tech & Durables market remained in slight YTD value growth.
- Sales in the second quarter of 2025 were flat vs the same period in 2024. Office and CE experienced a tough period of decline. Telecom might have been worse, but the Spanish market saw growth, so overall only a slight decline of 1%. The IT industry (+6%) saw continued replacement/upgrading, MDA and photo saw healthy growth, whilst SDA took over the mantle of best performance.
- Spain outperformed (+4%). Germany and Great Britain were flat, Italy (-1%) picked up slightly vs Q1. France (-2%) declined, where MDA did not perform whilst it did in other regions.

Channel Dynamics

- The overall online/offline dynamics remained stable at total Western Europe level. We saw online with sales with continual growth.
- The traditional channel's performance remained steady but in slight decline. Spain here however must be highlighted with sales growth in physical stores outperforming online sales!

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office|
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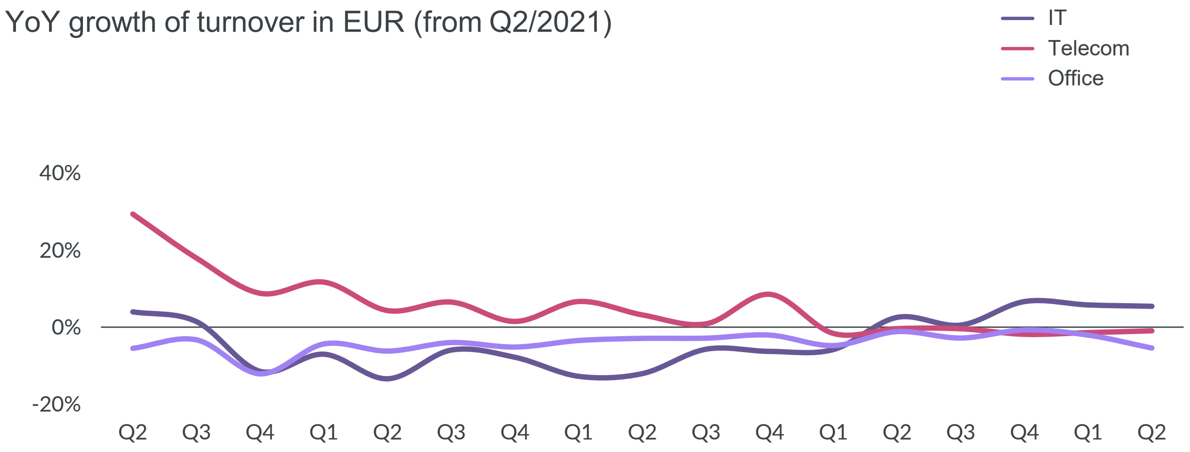
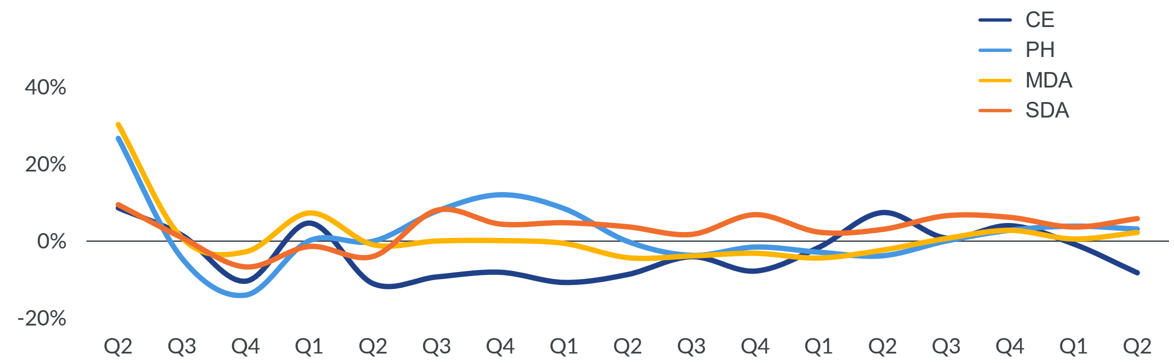
Helicopter View Western Europe

Western Europe
Contact person:
Erol Sukan
(MI Lead)
Erol.Sukan

YoY growth of turnover in EUR (from Q2/2021)





Growing & declining product segments

- The SDA (+6%) market was best performer in Q2 with growth in all major WE regions. In some countries, air fryers and robot cleaners led the way, in others, coffee and air treatment/fans were the growth drivers.
- Any fears of the IT sector (+3%) growth being a one or two quarter wonder were allayed. We are now at three consecutive growth quarters as consumers replaced and upgraded.
- The photo sector (+3%) continued to show value growth in 2025.
- MDA (+2%) outperformed both Q2 2024 and Q1 2025, showing growth in all major regions bar France with a small decline.
- The telecom (-1%) sector struggled again in Q2. All major regions saw decline except for Spain where operator sales really drove growth.
- The office products' decline (-5%) was stronger in Q2 than in YTD. All major regions showed declines, with hardware and cartridges purchases being slow.
- Consumer electronics (-8%) started 2025 with a small dip, but this dip has deepened. It was always going to be a challenge after a strong 2024 thanks to major sporting events. Early July indicators are unfortunately not showing a reversal of fortunes.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office| WEU: AT BE CH DE DK ES FI FR GR IT LX NL NO PT SE UK

Helicopter View France

France
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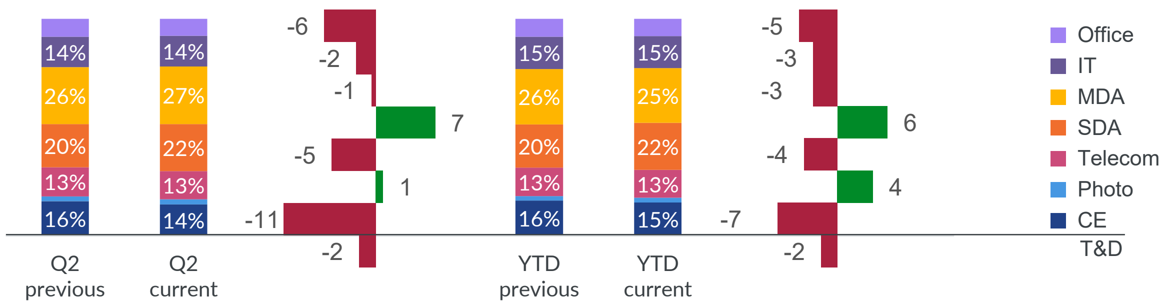
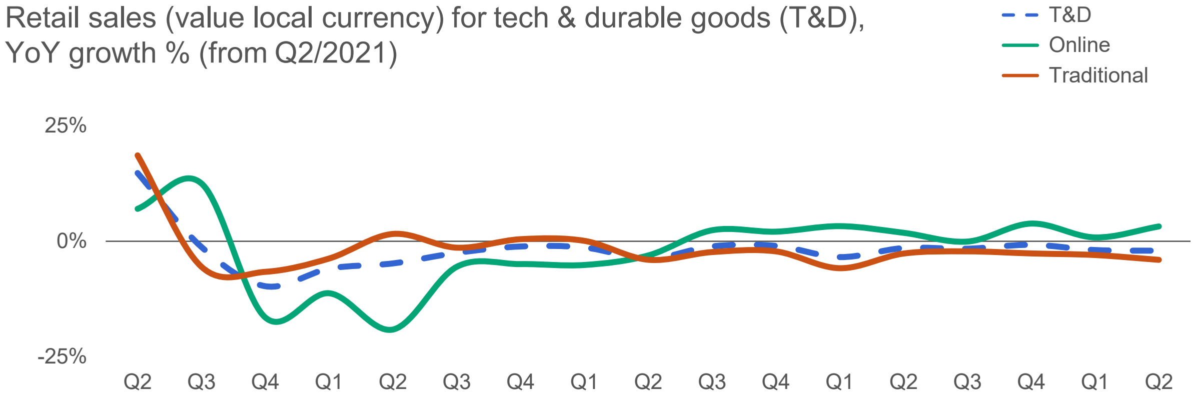
(MI Lead T&D)
Pierre.Geismar

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- Even though willingness to buy improved in past months, the T&D market in France continued to decline by 2% in Q2 2025.
- While a first summer heat wave occurred quite soon in the year in June, driving growth of some SDA and MDA categories, this could not compensate the decline compared to past year's TV sales peak which was due to the Euro Championship 2024.
- In this context, CE showed the strongest difficulties, telecom continued to suffer, decline was more moderate on IT and MDA, while SDA continued to overperform.

Channel Dynamics

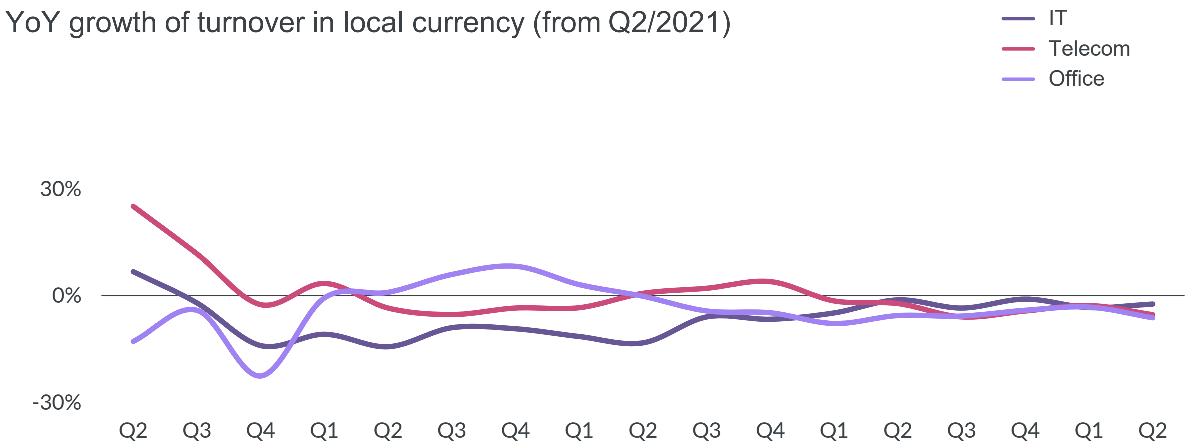
- Online sales performed very well in Q2 2025, with stronger results compared to in-shop sales in all sectors, and actual growth for all sectors except for CE.

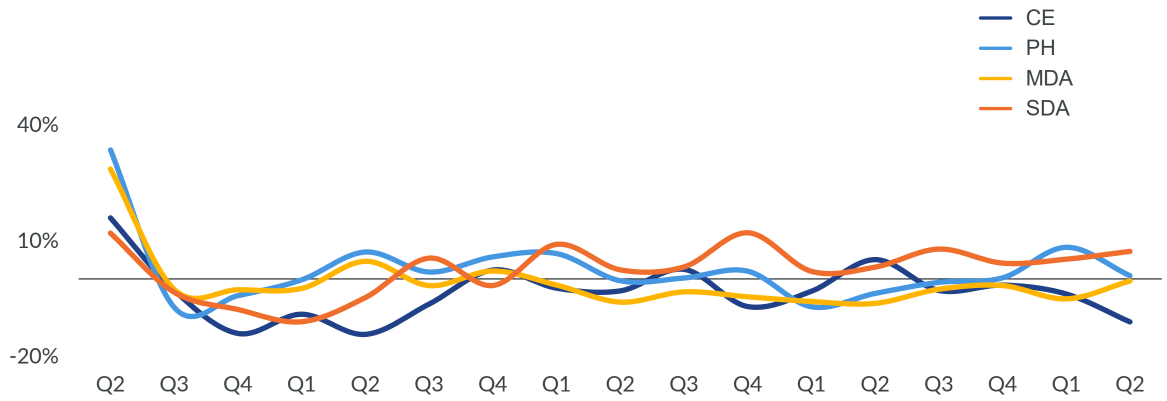
Source: GfK Market Intelligence: Sales Tracking, Panelmarket excl. SH/TCR, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View France

France
Contact person:
Pierre Geismar
(MI Lead T&D)
Pierre.Geismar

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

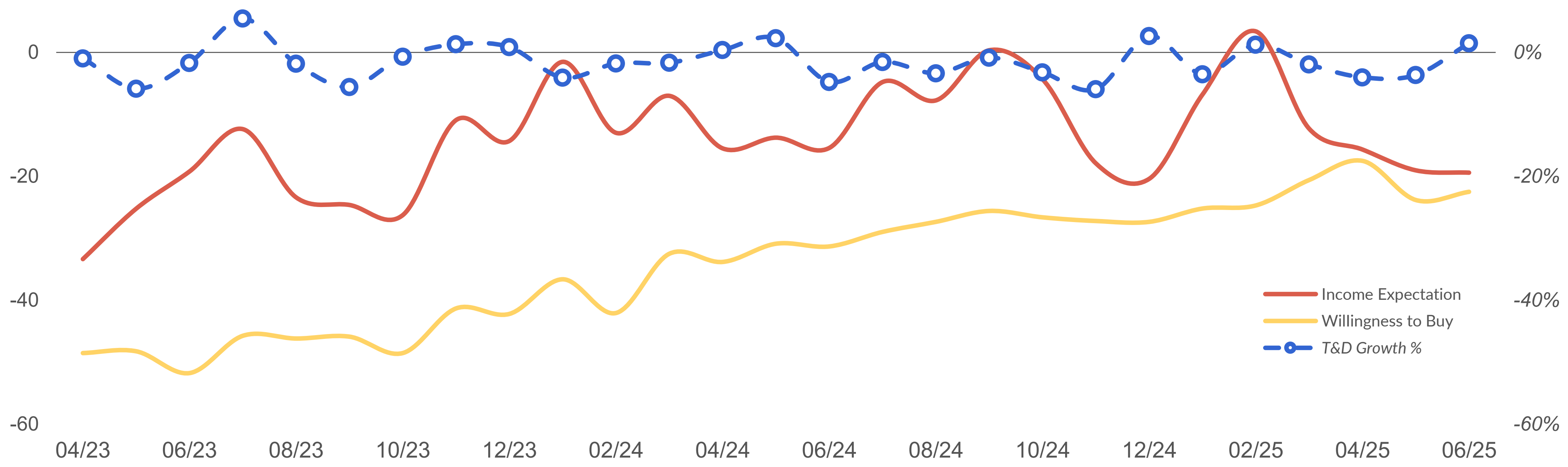
- The SDA market continued to grow, driven by the same recent drivers, such as hot air fryers, vacuum robots, and multifunctional vacuum cleaners, but due to heatwaves also by weather-sensitive categories like air treatment and fans.
- MDA continued to struggle due to the difficult economic & housing context. Consequently, built-in appliances were still particularly impacted. Only fridges and air conditioners managed to find growth thanks to high temperature peaks.
- The IT market pursued a stronger decline in Q2, due to offline channels. Media tablets, SSD, and netcams contributed to growth with declining prices, while overall, prices increased in IT.
- The OE sector continued its decline. In online channels, inkjet cartridges and MFD grew, though.
- While average prices of smartphones started to grow again, in Q2 the loss in volume demand was not compensated, mostly in non-operators. On the other hand, smartwatches strongly grew, on lower price classes above all.
- TV sales unsurprisingly dropped compared to last year's sales peak due to Euro Championship 2024. In CE, only Bluetooth speakers grew in Q2 driven by promotional activities.

Source: GfK Market Intelligence: Sales Tracking, Panelmarket excl. SH/TCR, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Spotlight on NIQ Consumer Climate and T&D in France

France
Contact person:
Pierre Geismar
(MI Lead T&D)
Pierre.Geismar

Monthly Index Income Expectation & Willingness to Buy
& Growth Rate T&D % YoY (T&D)



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NIQ Consumer Climate – Reading example

If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

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Helicopter View Germany

Germany
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Alexander Dehmel
(MI Lead)
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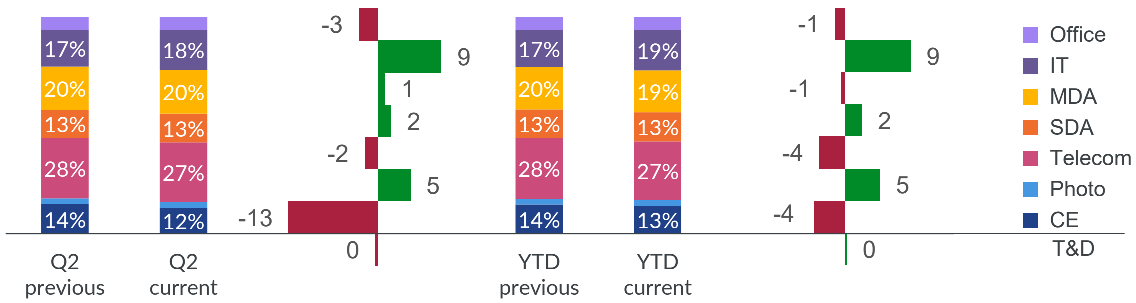
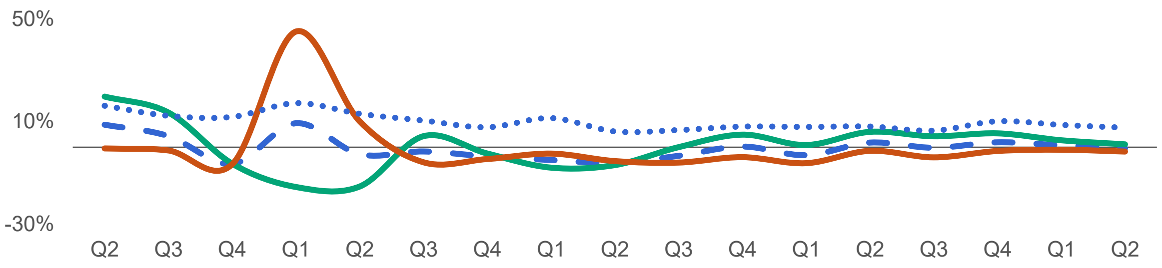
Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- Q2 2025 continued to see a stable positive trend. April and May performed strongly, while June was below last years' sales value which was driven by the Euro Cup in 2024. Overall, the markets stabilized in the first half of 2025 and gave a positive outlook for the rest of the year.
- The IT sector continued to outperform the market. Replacement purchases of devices purchased during the pandemic drove the market and will continue in 2025 with the Windows 10 support ending. The photo sector continued positively while SDA drove the market, but less strongly compared to 2024. Major domestic appliances turned slightly positive in Q2.
- Telecom and office sectors were slightly negative in Q2, while consumer electronics dropped at -13%.
- The Tech & Durables market in 2025 is set to grow slightly, but ultimately, it will depend on how consumer sentiment develops.

Channel Dynamics

- Online as well as offline sales stabilized their development presented in past quarters.
- Online continued to develop slightly more positive than offline.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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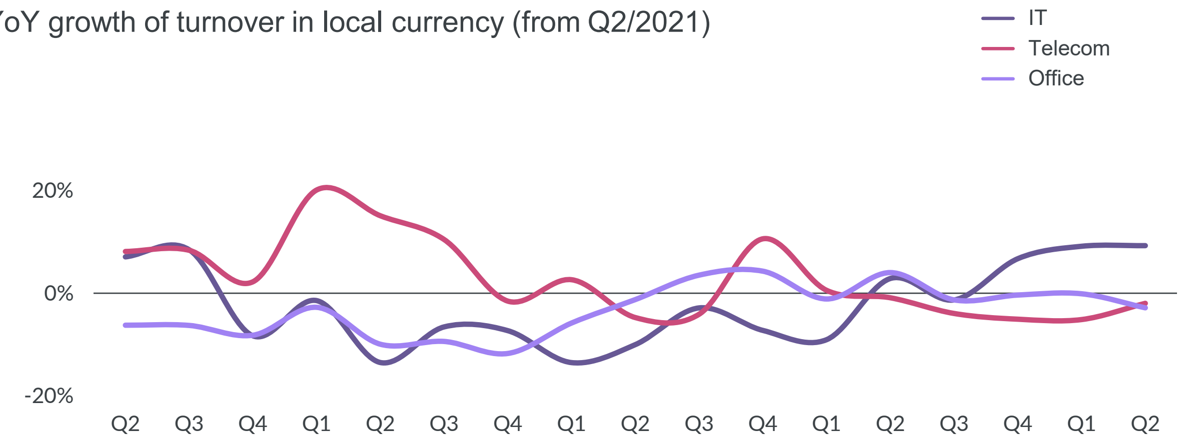
Helicopter View Germany

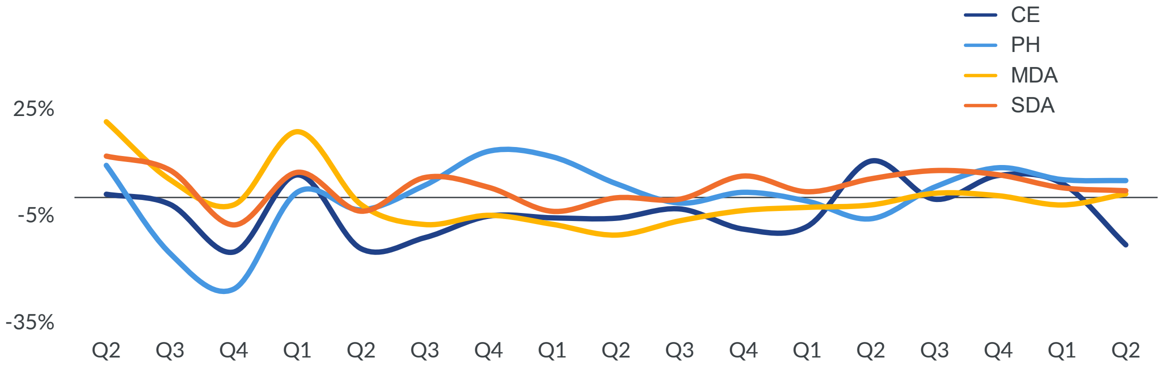
Germany

Contact person:
Alexander Dehmel
(MI Lead)

Alexander.Dehmel

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- Mixed developments in Q2 for the IT and office sectors: While IT performed extremely well with most major categories contributing to this growth, the office sector posted decreasing turnover driven by cartridges. Printing hardware posted positive results.
- The telecom sector declined in Q2 2025, driven by most categories (incl. smartphones). Only core wearables grew YoY, driven by smartwatches without SIM and smart rings, which made their wider market debut in 2024.
- The CE sector showed a negative Q2, running against a very positive previous year (Euro Cup 2024). In particular, demand for TV sets was significantly below the previous year and consequently impacted the sector's result. Moreover, hardly any product group achieved last year's sales.
- In Q2 2025, the MDA market remained slightly below last year's level, though showing a more positive trend than in Q1. Only built-in hobs and dishwashers recorded value growth – driven by offline and online channels, respectively. Tumble dryers and microwave ovens were the weakest product groups.
- The SDA market showed a positive result for Q2 2025, but growth rate slowed down. Full-automatic espresso machines and handstick rechargeable vacuum cleaners showed ongoing decline in value whereas air fryers, robots, and traditional pump machines made significant positive contribution.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Spotlight on NIQ Consumer Climate and T&D in Germany

Germany
Contact person:
Alexander Dehmel
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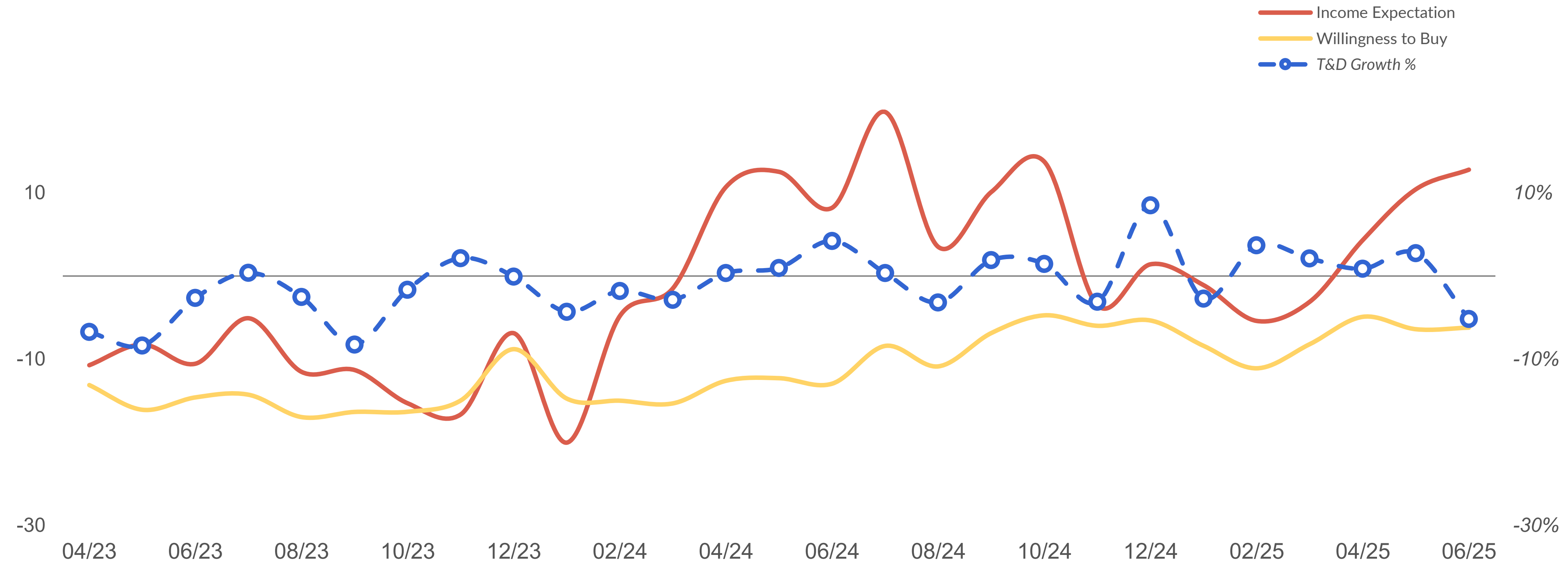
Monthly Index Income Expectation & Willingness to Buy & Growth Rate T&D % YoY (T&D)



NIQ Consumer Climate – Reading example

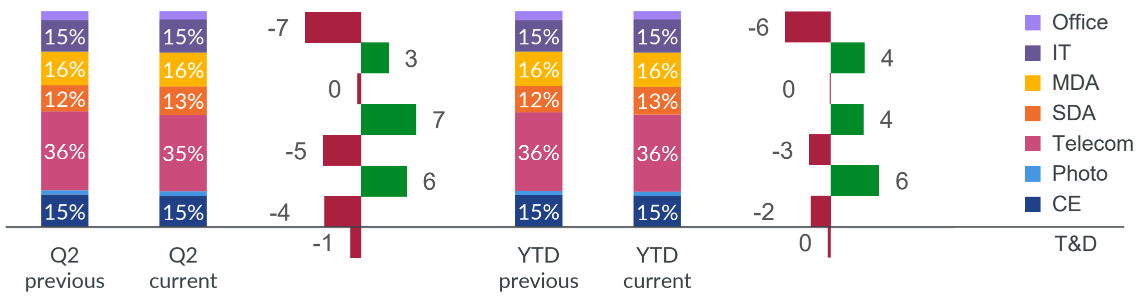
If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

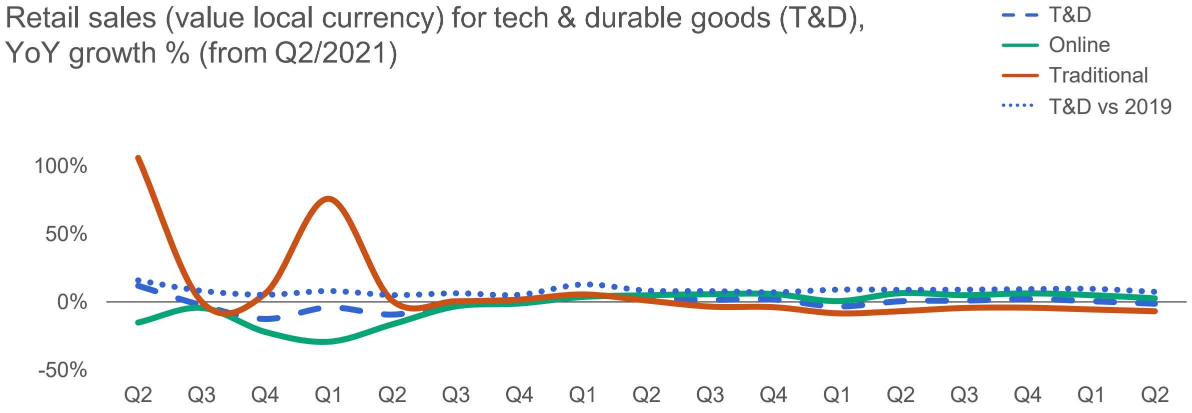
Helicopter View Great Britain

Great Britain
Contact person:
Kelly Creaby
(Retail T&D CS Lead)
Kelly.Creaby

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The UK market showed signs of optimism after deep declines over the last few years. The upturn in retail sales comes despite still low and wavering consumer confidence.
- Despite the constraints on household budgets, consumers continued to buy for their immediate needs which tend to be weather-based or event-based.
- This had been illustrated this spring, with the warm sunny weather, a contrast to the dismal spring of 2024, and we saw consumers shift focus from tech to outdoor and garden activities.
- With focus on outdoor activities, sales of tech products have fallen compared to last year, again highlighting the decisions consumers have to make on where to spend. The focus on garden in April and the late May bank holiday saw some interest back on tech goods.

Channel Dynamics

- In most other areas store closures were encouraging more consumers to buy online. Internet sales now account for over half the market.
- In-store remained important for specialized items and for low-value items that do not warrant a delivery fee. Shoppers also headed in-store for the convenience of need-it-now items.

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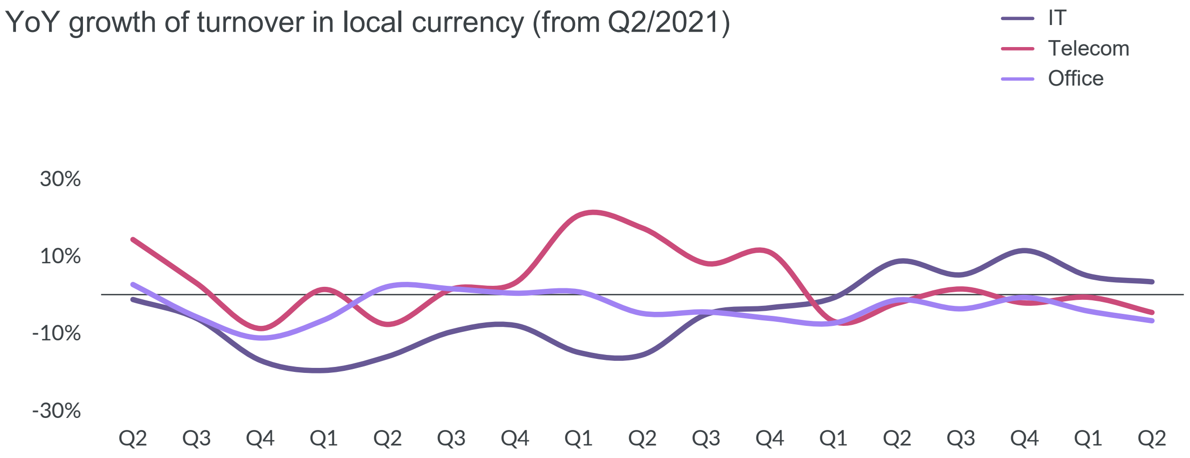
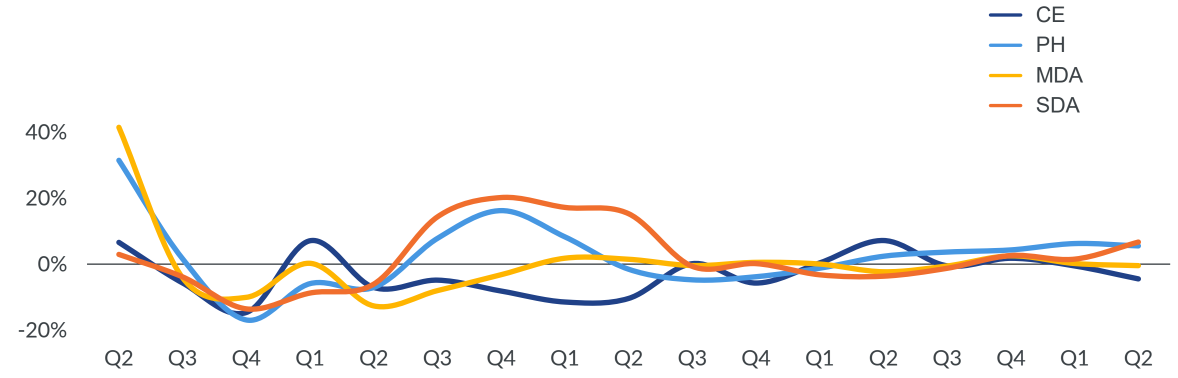
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Great Britain

Great Britain
Contact person:
Kelly Creaby
(Retail T&D CS Lead)
Kelly.Creaby

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- YTD saw a flat performance, with mixed development across each category.
- This is not surprising as consumers remained cautious, especially when inflation is yet to ease to the 2% target, with food prices increasing at the highest rate since February 2024.
- IT, SDA, and photo all saw strong growth, thanks to COVID replacement cycles kicking in, and new products in these areas.
- CE remained a challenging area with sales still contracting. This was largely driven by falling TV & game console sales (new Xbox expected sometime in 2026 and PlayStation to match or follow in 2027).
- MDA remained flat, with a lack of innovation and new products not helping this market. The housing market also impacted this sector, and the housing market in the UK right now is stagnant, so there are various factors making this market more challenging.
- Whilst the T&D market saw a flat performance, as referenced, this had not been helped by the shift in spend towards DIY/garden/ outdoors items, thanks to the unusually warm and sunny weather. We would expect to see T&D start to recover towards the end of the year.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Spotlight on NIQ Consumer Climate and T&D in Great Britain

Great Britain

Contact person:
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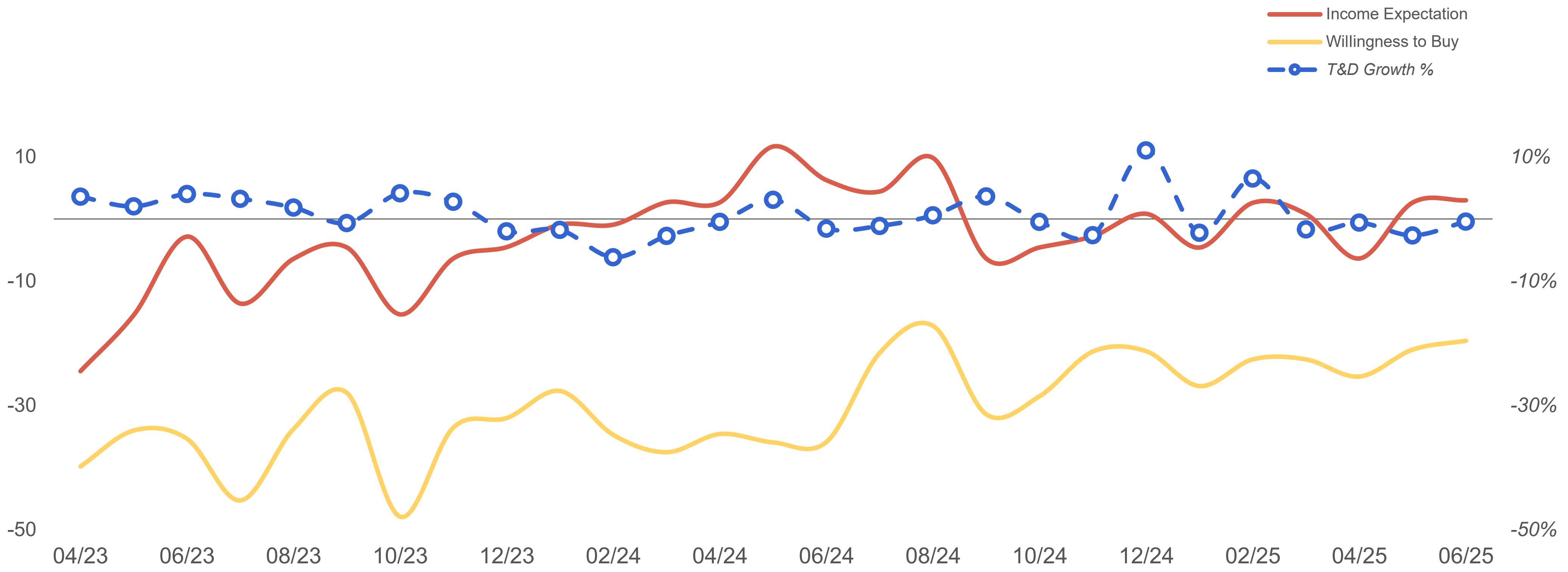
Kelly.Creaby

Monthly Index Income Expectation & Willingness to Buy & Growth Rate T&D % YoY (T&D)



NIQ Consumer Confidence Barometer – Reading example

If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

Source: GfK Consumer Confidence Barometer - powered by NIM. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

Helicopter View Italy

Italy
Contact person:
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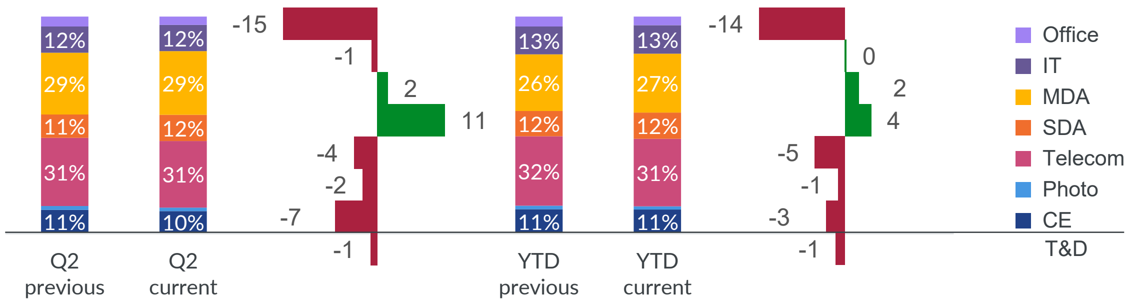
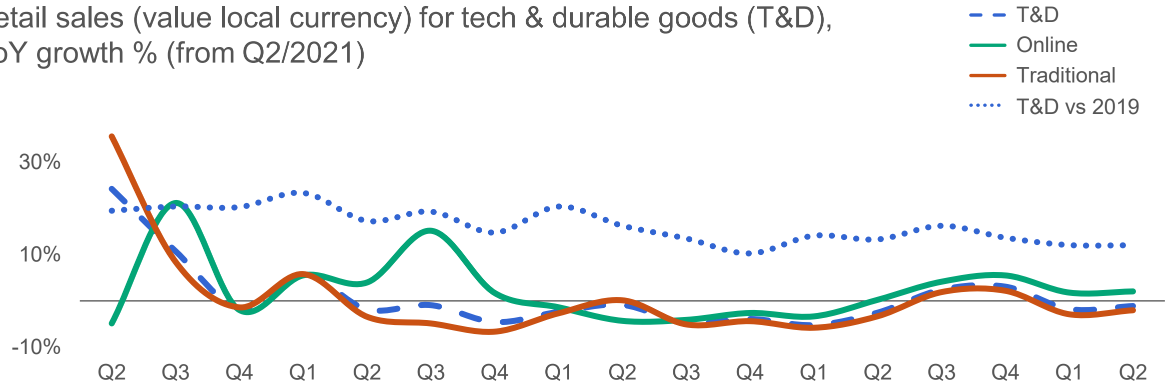
Martina.Resnati

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- In Q2 2025, the Italian Tech & Durables market registered a -1% decrease in terms of value compared to Q2 2024.
- The only positive sectors were SDA and MDA which registered +11% and +2%, respectively.
- By contrast, all the other sectors performed negatively: telecom, IT, CE, photo, and office (-4%, -1%, -7%, - 2%, and -18%, respectively).

Channel Dynamics

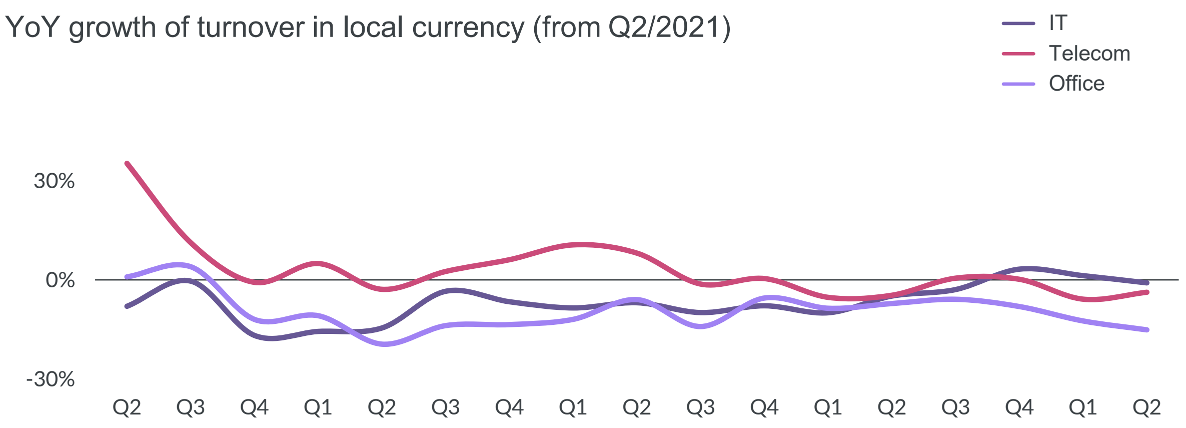
- In Q2 2025, online sales continued their positive trend, increasing by +3% compared to the same quarter of the previous year.
- Conversely, traditional sales had a negative impact within the Tech & Durables market, posting decline of 2%, maintaining the negative performance registered in previous quarters and opposite to the positive performance at the end of 2024.

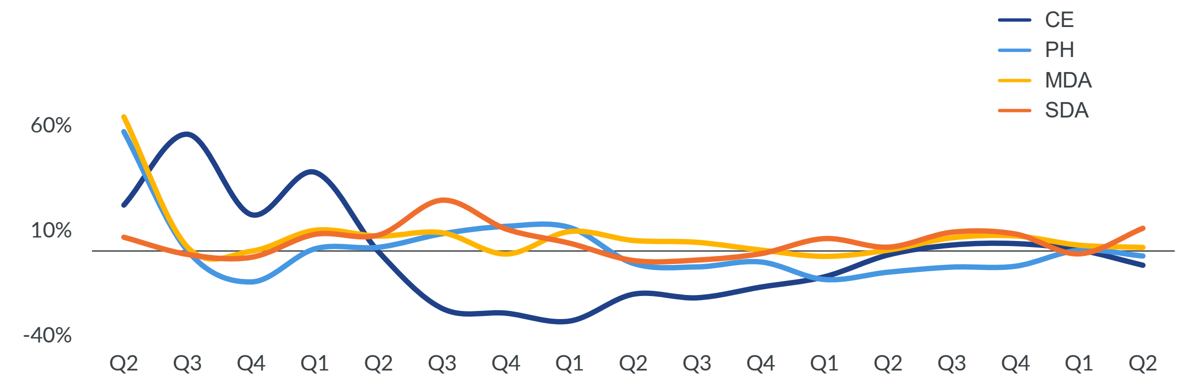
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Italy

Italy
Contact person:
Martina Resnati
(MI Retail)
Martina.Resnati

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- MDA registered a positive trend (+2%), essentially due to the good performance of air conditioners (+28%) and cooling (+3%). By contrast, some other main product groups were negative, such as microwave ovens (-13%) and tumble dryers (-15%).
- SDA showed a similar scenario (+11%). The main positive product groups were vacuum cleaners (+15%), shavers (+7%), food preparation (+6%), dental care (+9%), and electric fryers (+6%) while hot beverage makers were flat. Irons (-5%), hair stylers (-4%), hair dryers (-5%), and water filters (-4%) declined.
- CE was negative, impacted by the performance of PTV (-9%), audio home systems (-6%), and set-top-boxes (-32%). Headsets were flat with no impact on a positive result overall.
- IT delivered a negative trend, influenced by mobile computing (-4%) and desk computing (-10%). Gaming and leisure devices (+5%) and storage (+9%) performed well, while tablets and monitors were flat.
- The negative performance of telecom was driven by all its product groups except for core wearables which were flat. The office sector dropped as well, primarily driven by cartridges and multifunctional devices.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

World

Western Europe

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PREV NEXT

Spotlight on NIQ Consumer Climate and T&D in Italy

Italy

Contact person:
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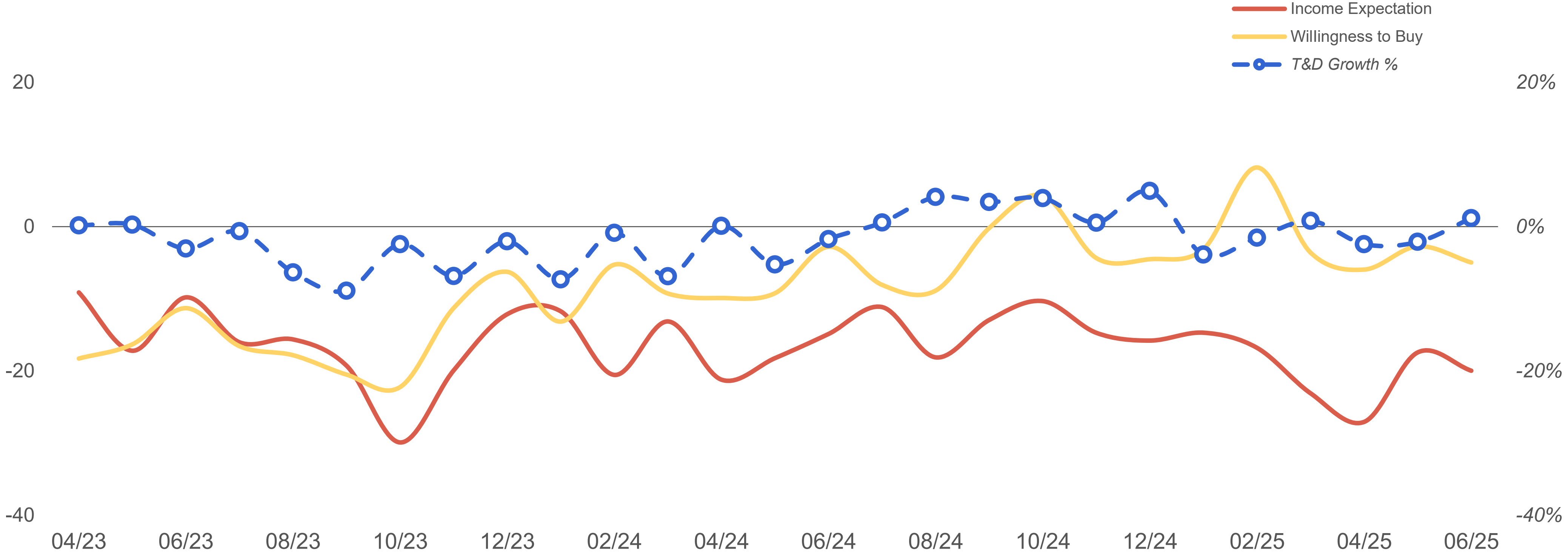
(MI Retail)

Martina.Resnati

Monthly Index Income Expectation & Willingness to Buy & Growth Rate T&D % YoY (T&D)



NIQ Consumer Climate – Reading example

If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

Helicopter View Spain

Spain
Contact person:
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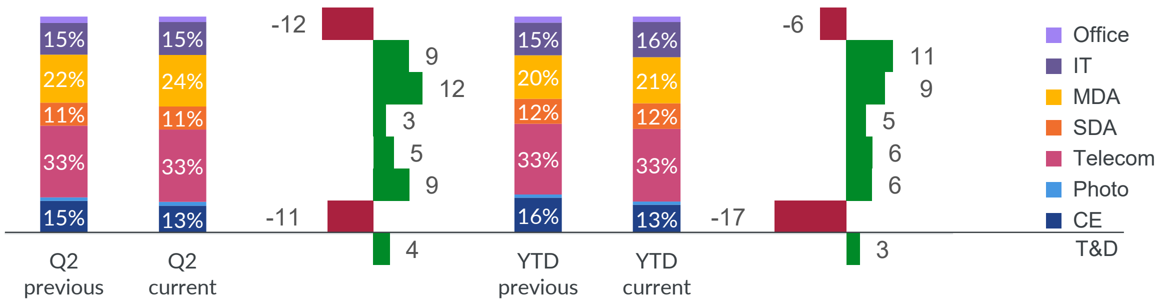
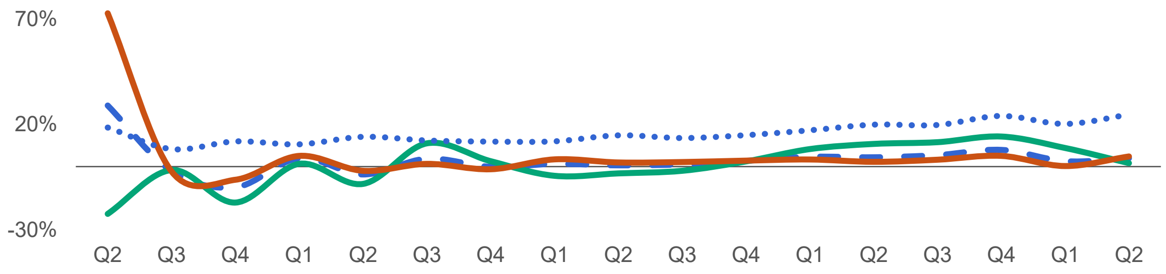
(Regional Retail)
Elena.Toribio

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The rebound effect due to the switch-off of SD channels in 2024 continued, but the decline was gradually moderating month after month.
- The rest of sectors increased their turnover (except office), with MDA being the best performing one, followed by IT and telecom.
- As already mentioned last quarter, the shift in Easter dates resulted in April 2025 having fewer working days than April 2024. In addition, a complete power outage on April 28 significantly disrupted both brick-and-mortar and online retail.
- In the weeks following the outage, sales of self-powered or battery-powered devices (such as radio devices, batteries, power banks, etc.) increased significantly.

Channel Dynamics

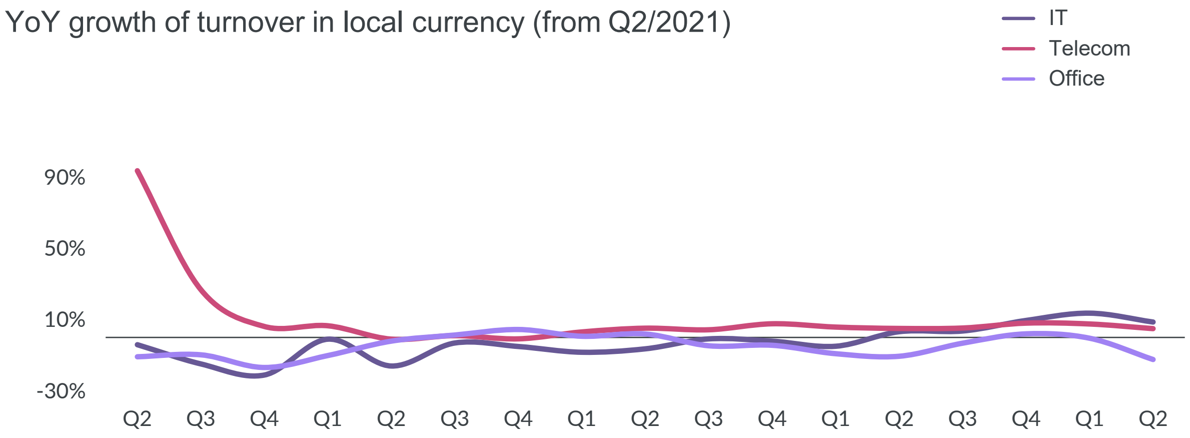
- Sales in physical stores grew twice as much as online sales. We observed this difference during the first two months of the quarter. In general, we noted lower promotional activity compared to the same quarter in 2024.
- June is the best month of the quarter for both types of retail, with similar growth rates.

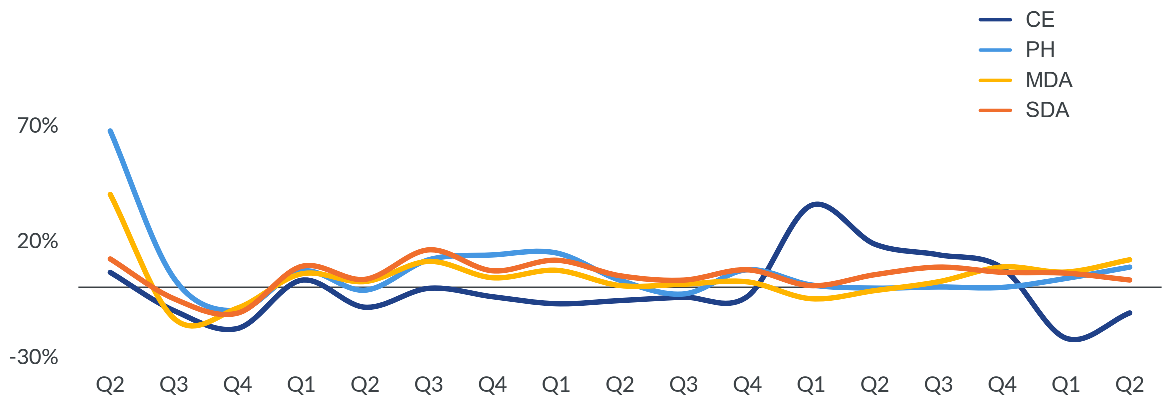
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Spain

Spain
Contact person:
Elena Toribio
(Regional Retail)
Elena.Toribio

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- The T&D market in Spain grew thanks to the strong performance in June, while the first two months of the quarter showed barely any growth.
- In Q2, MDA became the best performing sector. The real estate market was very dynamic, the number of housing transactions increased and impacted MDA products very positively.
- Sales of SDA slowed down compared to previous periods. Online sales had better results than instore sales. Performance differed considerably by category. Thus, among the top categories, coffee machines stood out as the best-performing category, vacuum cleaners were flat, and fryers sales dropped sharply.
- As mentioned, PTV sales declined this year, mainly because of the exceptional spike last year driven by the Euro Championship and the broadcast switch-over.
- IT performed well in general. Laptop sales remained strong, and even better in instore than online, but both ways of distribution showed a positive development. Consumables were the main factor behind the negative performance in the office segment, as machines showed a positive trend.
- In the category of smartphones, operator sales performed better compared to SIM-free phones.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Latin America

PREV NEXT

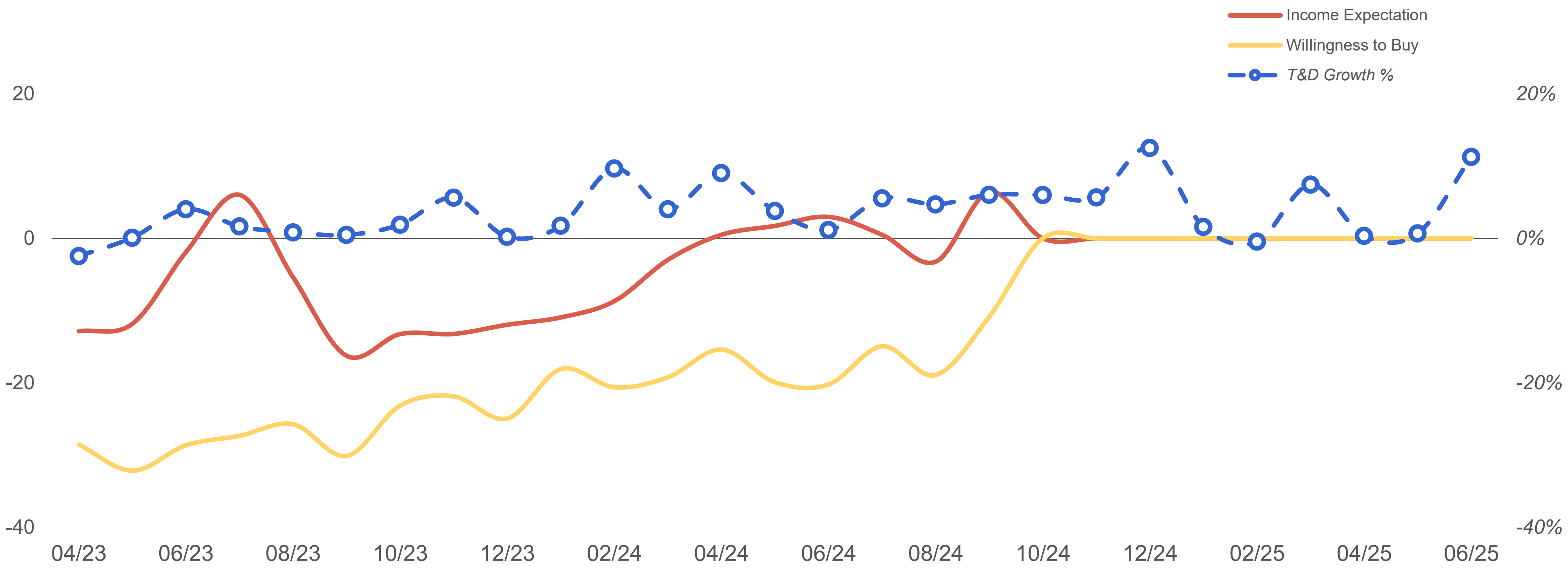
Spotlight on GfK Consumer Climate and T&D in Spain

Spain

Contact person:
Elena Toribio
(Regional Retail)

Elena.Toribio

Monthly Index Income Expectation & Willingness to Buy & Growth Rate T&D % YoY (T&D)



GfK Consumer Climate – Reading example

If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand. ES: Due to the insolvency of the field institute, presently no data available.

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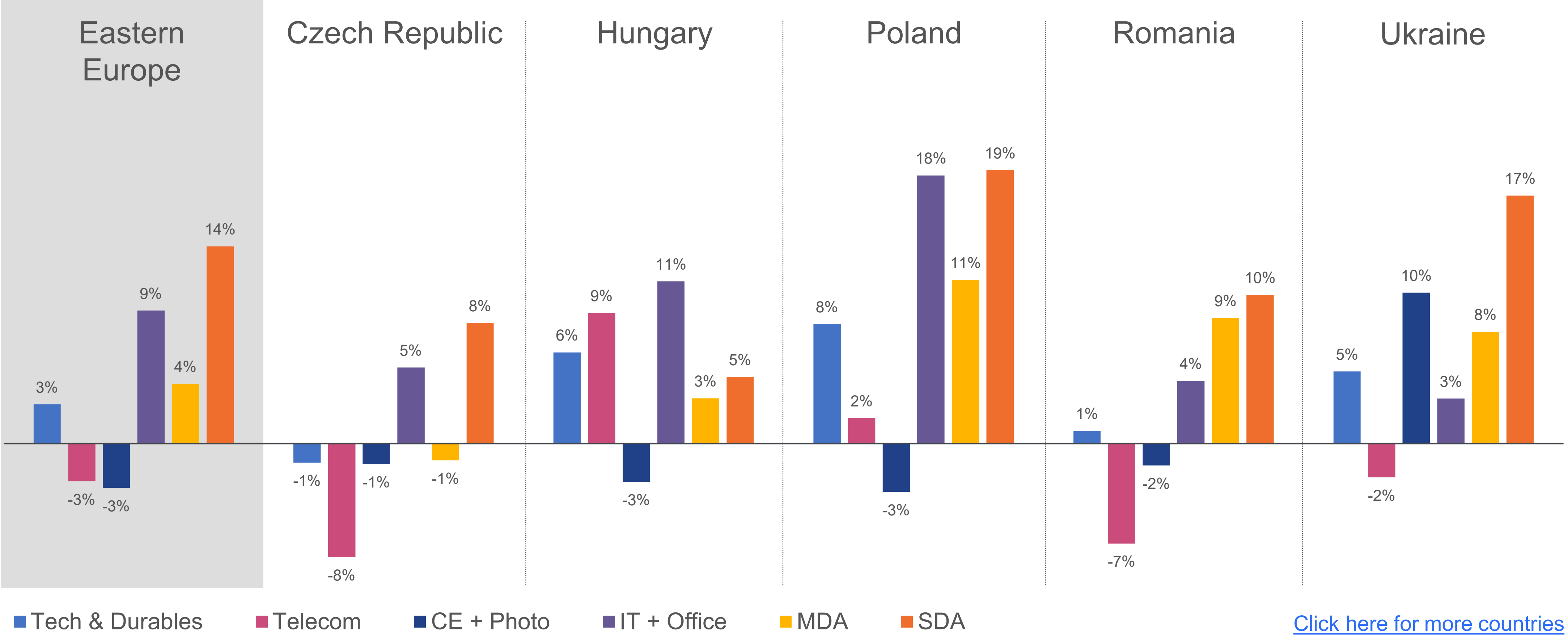
Small domestic appliances and IT outperformed. Saturation and a lack of innovation impaired telecom growth.

Eastern Europe
Contact person:
Artur Noga-Bogomilski
(MI Lead)
Artur.Noga-Bogomilski

EUR growth % YoY Q2/2025



Click here for more countries

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office|
EEU: CZ HR HU KZ PL RO RS SI SK UA |

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Hungary

Poland

Romania

Ukraine

Middle East, Turkey & Africa

APAC

Latin America

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Helicopter View Eastern Europe

Eastern Europe

Contact person:
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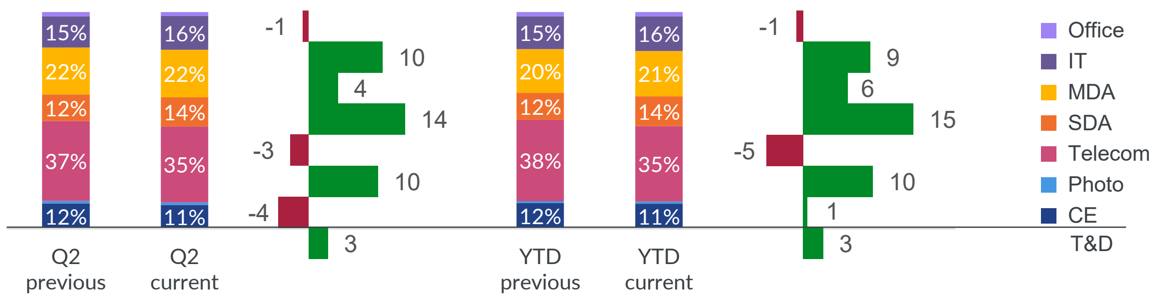
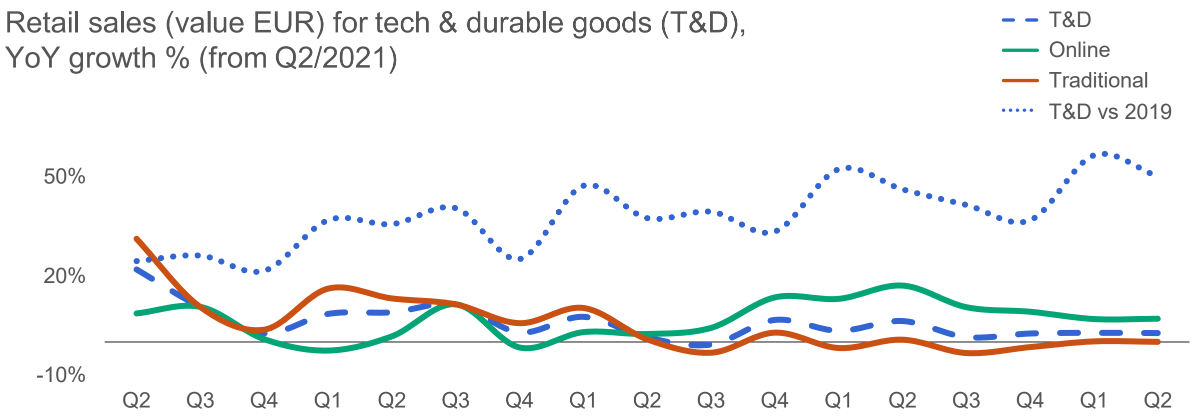
(MI Lead)

Artur.Noga-Bogomilski

Consumer basket and spending (value EUR) for tech & durable goods (T&D), YoY growth %



Retail sales (value EUR) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- Despite ongoing economic challenges and uncertainties, including concerns over a potential trade war, the Central European Tech & Durables market grew by 3% in Q2 2025. Ukraine (+14%), Hungary (+9%), and Poland (+7%) emerged as the primary drivers of this growth.
- The main growth engines were the small domestic appliances, led by kitchen equipment, health devices, and personal care appliances. This trend was particularly strong in Poland (19%) and Ukraine (17%).
- In contrast, Hungary displayed a distinct market profile. Growth in this country was modest, with increases largely concentrated in the IT & office and telecom product categories.

Channel Dynamics

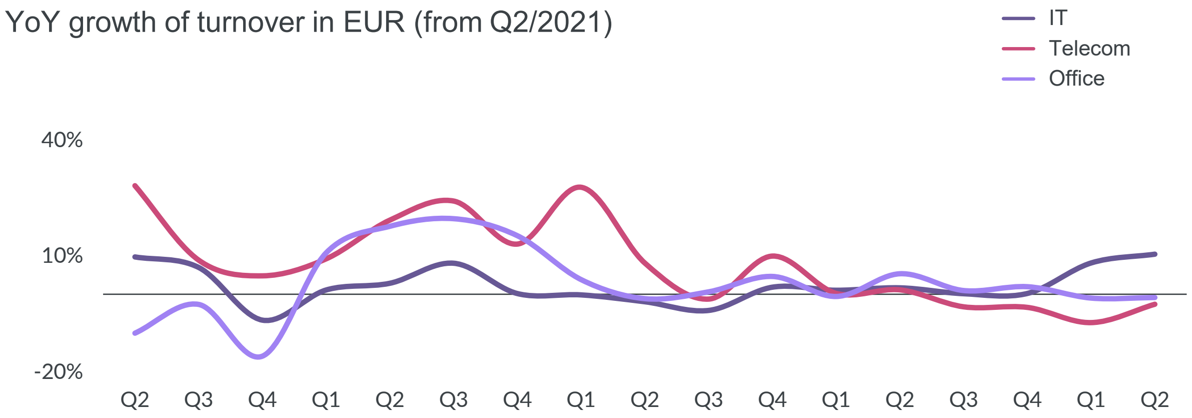
- A notable decline was observed across all markets in the telecom sector, especially in smartphone sales, which significantly impacted overall market growth.
- E-commerce continued its upward trajectory. From Q1 2021 to Q1 2025, the online sales channel steadily increased its market share, while traditional retail channels showed lower growth rates, stagnation, or slight declines during certain periods.

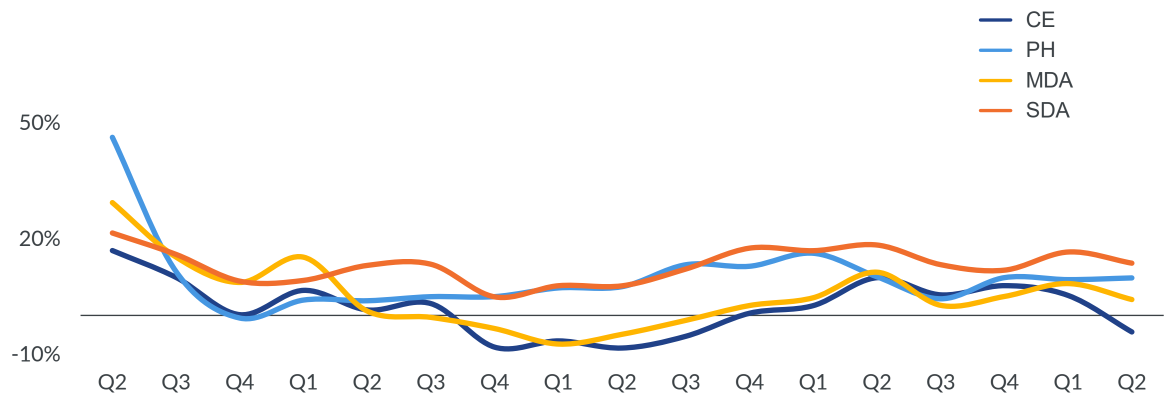
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | EEU: CZ HR HU KZ PL RO RS SI SK UA |

Helicopter View Eastern Europe

Eastern Europe
Contact person:
Artur Noga-Bogomilski
(MI Lead)
Artur.Noga-Bogomilski

YoY growth of turnover in EUR (from Q2/2021)





Growing & declining product segments

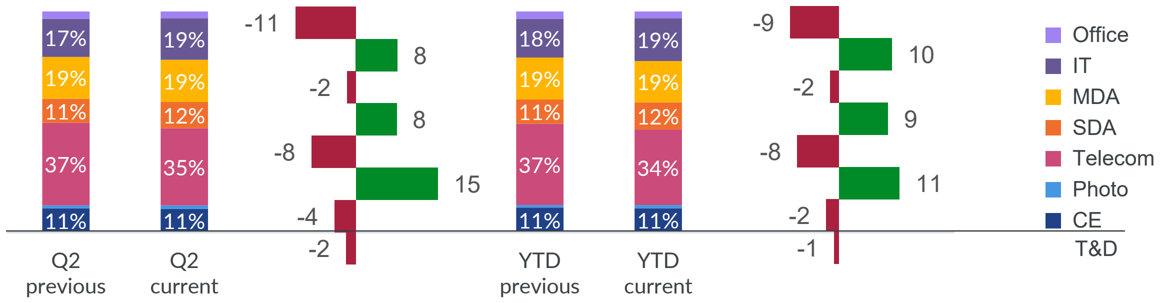
- We saw explosive growth in electric fryers across the region, especially in Ukraine (+235%), Poland (+115%), and the Czech Republic (+75%). This suggests a regional trend toward convenient cooking appliances, possibly driven by lifestyle changes or promotional campaigns.
- Desk computing had a strong momentum in Hungary and the Czech Republic. Hungary experienced a +70% increase in desk computing sales, while the Czech Republic saw a +47% rise. This may reflect increased demand for home office setups or educational infrastructure investments.
- Mobile computing gained traction in Poland (+29%) and Ukraine (+37%). This reflects growing demand for portable productivity tools, likely driven by hybrid work and education needs.
- Ukraine's digital cameras sales surged +79%, and the overall photo/optics sector grew +56%, indicating a rebound in consumer interest in photography, possibly linked to special war situation in the country.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | EEU: CZ HR HU KZ PL RO RS SI SK UA |

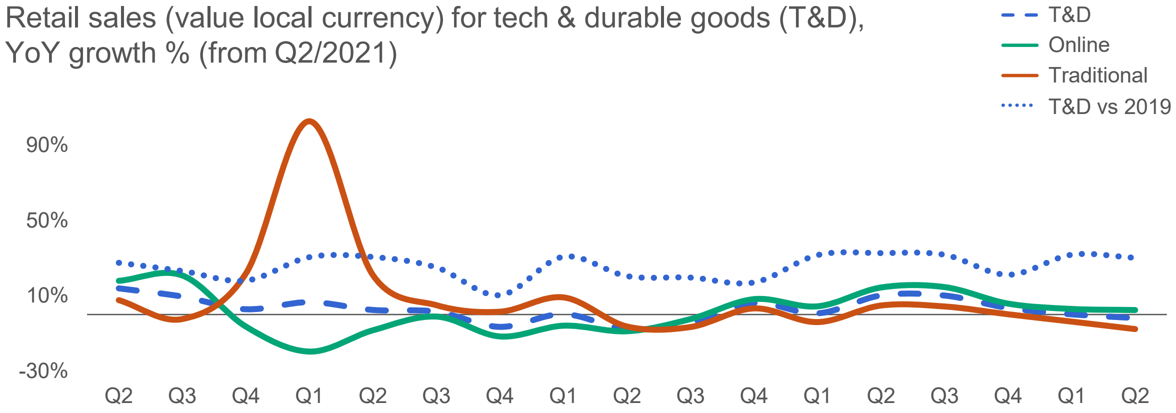
Helicopter View Czech Republic

Czech Republic
Contact person: **Zdenek Barta** (MI Lead)
Zdenek.Barta

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- CE sales continued their downward trend in Q2. The decline was mainly attributed to the lower sales in the key category PTV Flat, impacted by the last year's strong base and sport events-related demand.
- The IT sector was driven by double-digit year-on-year growth in average selling prices.
- The MDA sector remained flat in sales units, with price erosion causing slight decline in value.
- Telecom sales experienced a decline in the year-on-year comparison, despite rising average selling prices.

Channel Dynamics

- The traditional market experienced a lower sales performance compared to the online market, especially in the CE and MDA sectors.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Czech Republic

Czech Republic
Contact person:
Zdenek Barta
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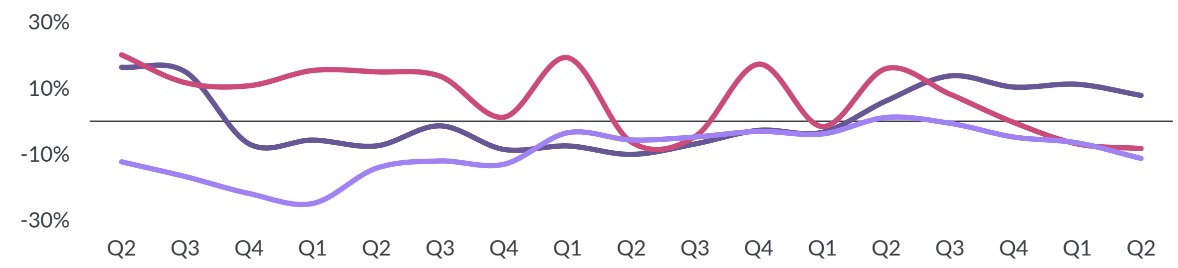
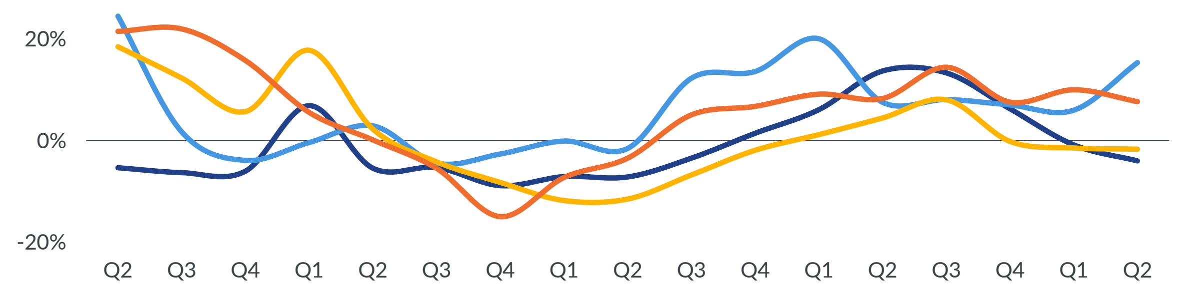
Zdenek.Barta

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- The office sector saw a sharp decline, driven by double-digit drops in both laser printing devices and laser cartridges. Revenue from inkjet printing devices remained quite stable.
- The photo sector performed well with double-digit revenue growth, driven by increased availability of ultracompact fixed lens cameras and demand for entry-level system cameras.
- Washing machines and dryers were able to grow YoY, with consumers leaning toward more energy-efficient appliances.
- Key drivers of SDA were hot air fryers and vacuum cleaners.
- The telecom downturn was primarily driven by smartphones with up to 128GB of storage. On the other hand, models with display sizes of 6.8” and above saw their revenue doubled in Q2.
- Smartwatch sales grew at a double-digit rate, largely due to a surge in unit sales of SIM/eSIM-enabled models.
- Media tablets achieved growth YoY due to increased unit sales and particularly thanks to the 11-12” display size segment, which surged by 70%.
- Mobile computers recorded a moderate increase, only due to rising average selling prices, with notable contributions from the non-gaming premium and ultrathin segments.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Spotlight on GfK Consumer Climate and T&D in Czech Republic

Czech Republic
Contact person:
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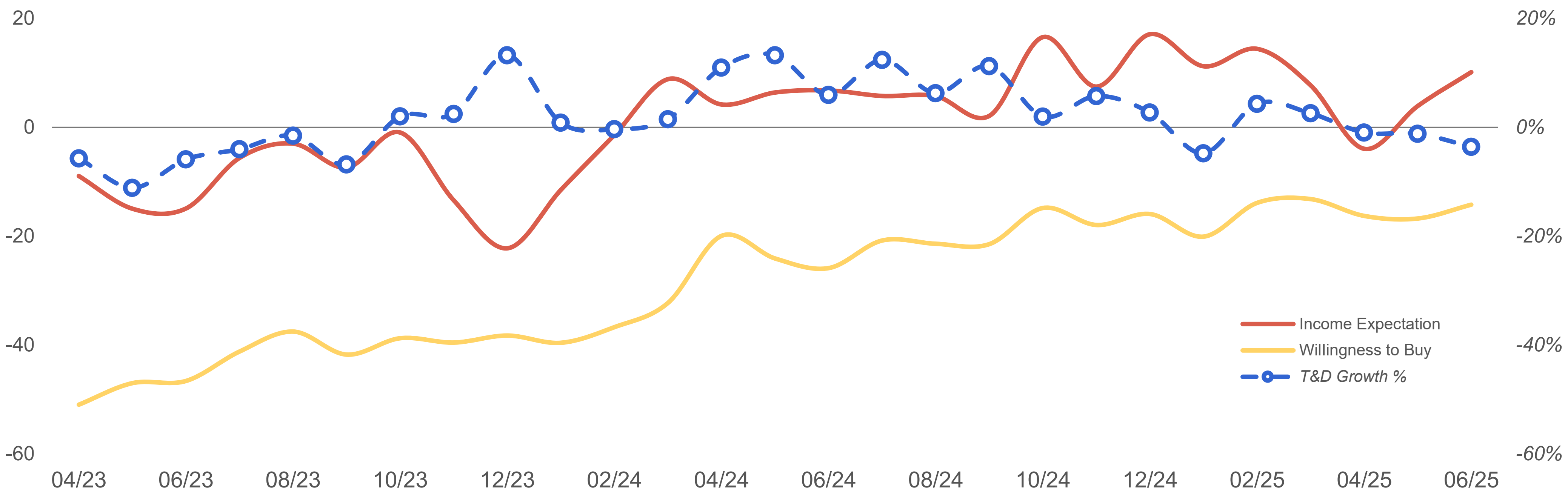
(MI Lead)
Zdenek.Barta

Monthly Index Income Expectation & Willingness to Buy
& Growth Rate T&D % YoY (T&D)



GfK Consumer Climate – Reading example

If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

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Helicopter View Hungary

Hungary
Contact person:
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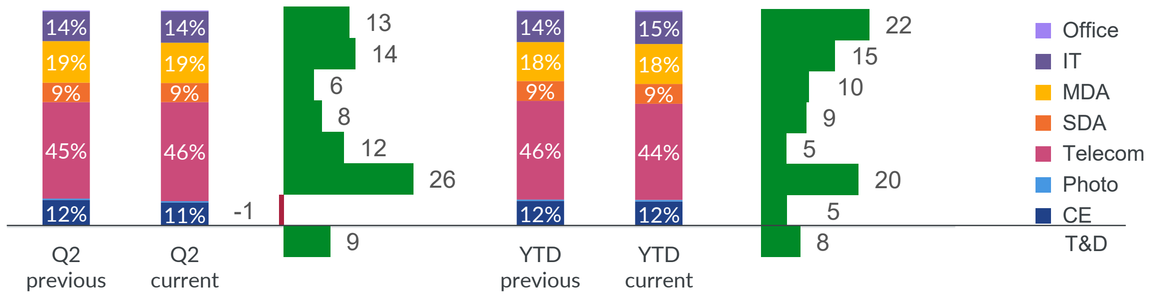
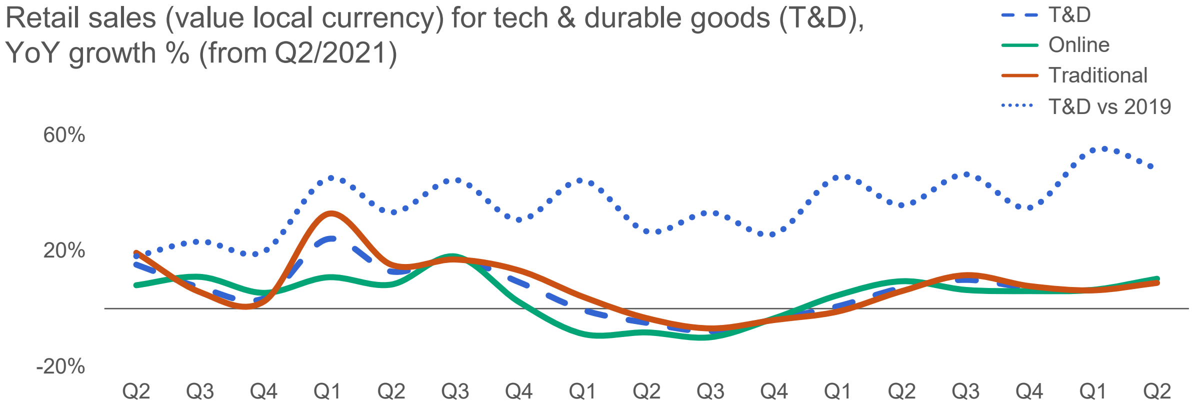
(MI Lead)
Andrea.Sztupar

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- With growth of 9% in Q2, the Hungarian T&D market could exceed last year's performance. However, the last month of the second quarter indicated a decline in growth rate.
- The strongest growing sector was the photo sector, for which growth mainly came from online sales. However, the base from past year was low.
- IT experienced stronger growth than the other sectors because many people bought notebooks and/or monitors for their older kids.

Channel Dynamics

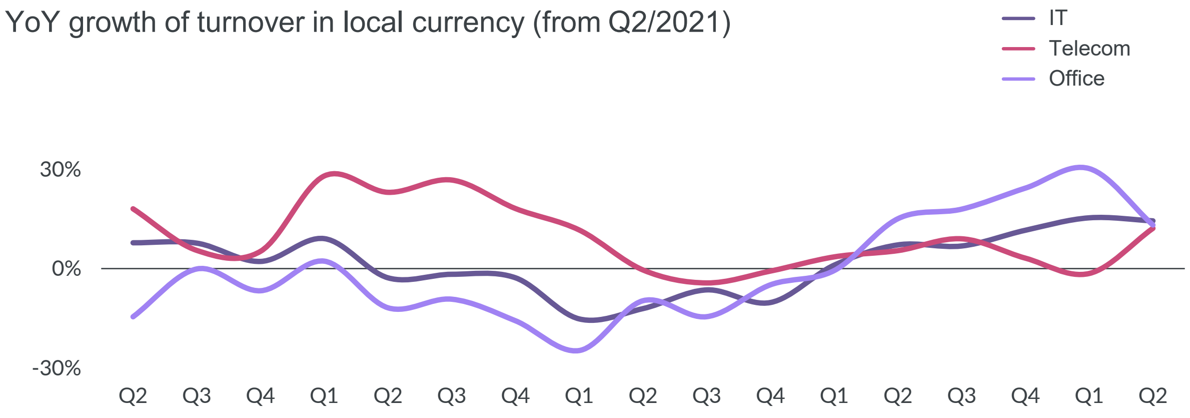
- Like in Q1, in Q2 both online and offline channels had a similar growth. In comparison, online was stronger in Q2.

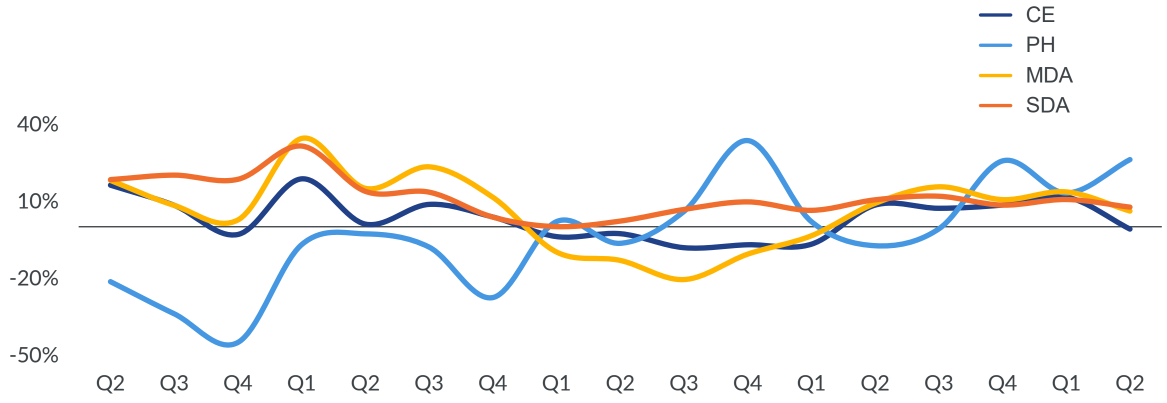
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Hungary

Hungary
Contact person: **Andrea Sztupár** (MI Lead)
Andrea.Sztupar

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

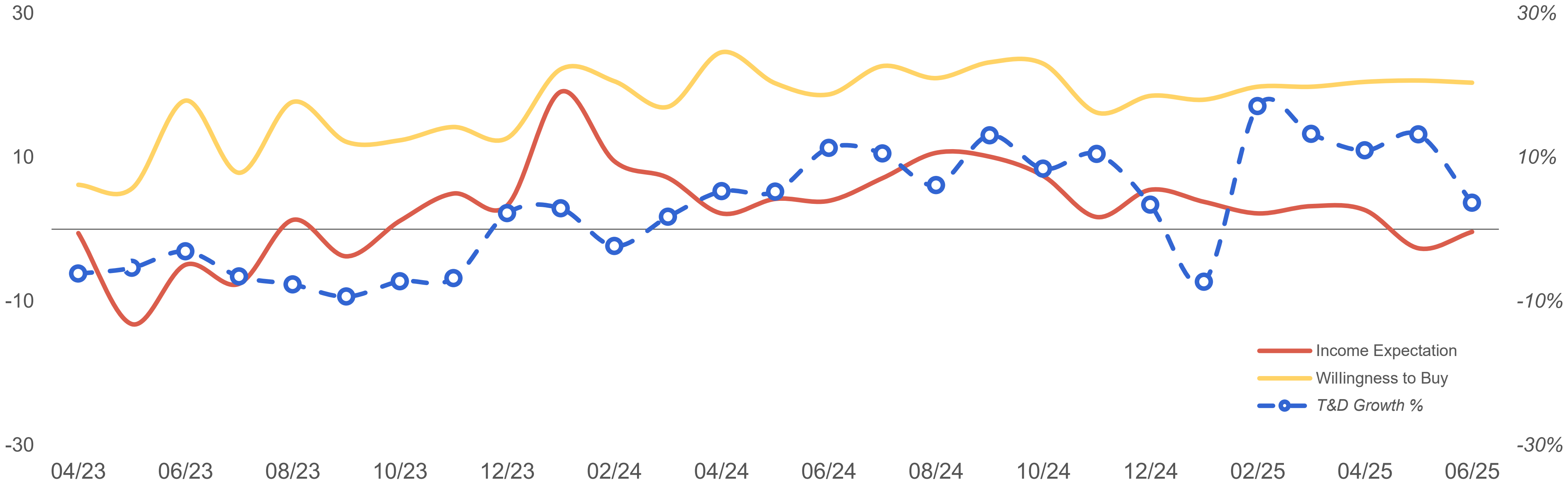
- The categories with the highest growth rates in IT/OE were storage, MFDs, and monitors. Sales of these categories increased better online than offline.
- In the telecom sector, only smartphones were able to perform better in Q2 than in the same period last year. Core wearables declined both online and offline.
- As PTVs dominate the CE sector, their decline of 3% in Q2 influenced this sector's performance.
- In the MDA sector, in Q2 only tumble dryers recorded double-digit growth in value both online and offline, while all other categories grew by 4% to 6%.
- The SDA sector performed well in Q2, at 7%, driven by the online sector. Robot vacuum cleaners, coffee machines, and food preparation equipment were the best-selling categories. Surprisingly, hot air fryers showed a heavy decline in Q2, in traditional sales.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Spotlight on GfK Consumer Climate and T&D in Hungary

Hungary
Contact person:
Andrea Sztupár
(MI Lead)
Andrea.Sztupar

Monthly Index Income Expectation & Willingness to Buy
& Growth Rate T&D % YoY (T&D)



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GfK Consumer Climate – Reading example

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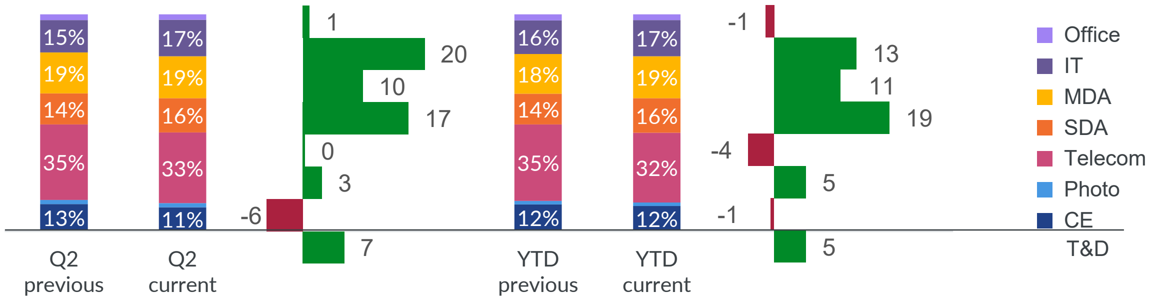
Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

Helicopter View Poland

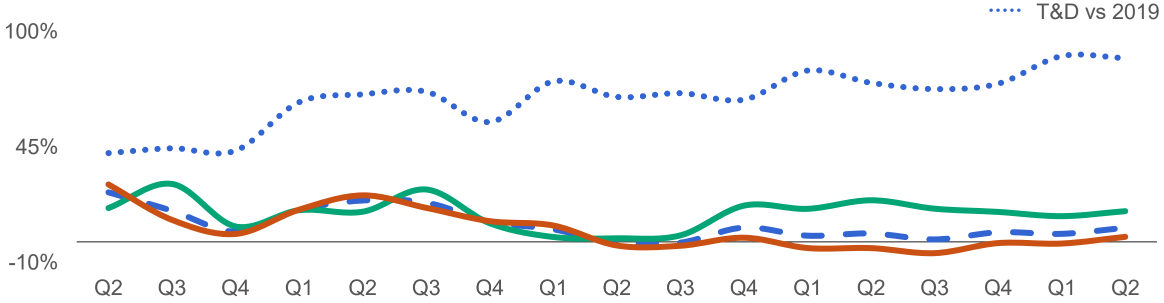
Poland

Contact person:
Artur Noga-Bogomilski
(MI Lead)
Artur.Noga-Bogomilski

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- In Q2 2025, the Polish Tech & Durables market recorded significant growth of 7% compared to Q2 2024. This continued the positive trend observed previously, although the market expansion rate was no longer as high as during the earlier post-pandemic periods.
- The IT segment achieved the highest sales growth among all sectors in Q2 2025, increasing by approximately 20% and raising its share of total T&D sales from 15% to 17%. SDA also recorded strong growth, raising its market share from 14% to 16%.
- The consumer electronics sector emerged as the biggest drag on the market. Sales revenue fell by approximately 6%. CE, in which TV is the key product group, reduced its share to 11% in Q2 2025 (13% in Q1).

Channel Dynamics

- The sales structure continued to shift toward online. It is estimated that e-commerce now generates about one-third of the T&D market value (approximately 34% in Q1 2025 compared to 31% a year earlier), while traditional retail accounts for the remaining two-thirds (its share is steadily decreasing). This trend highlights the growing importance of digital channels in distribution strategies.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Helicopter View Poland

Poland

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(MI Lead)
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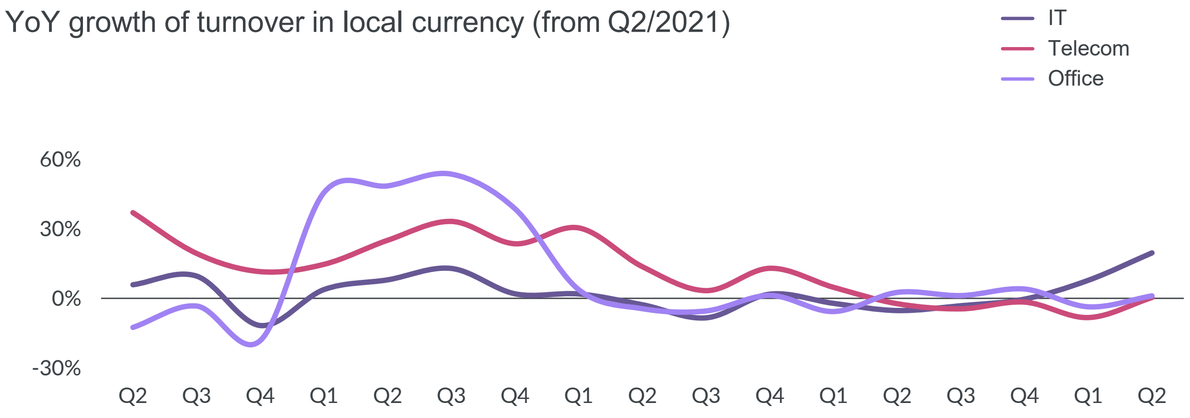
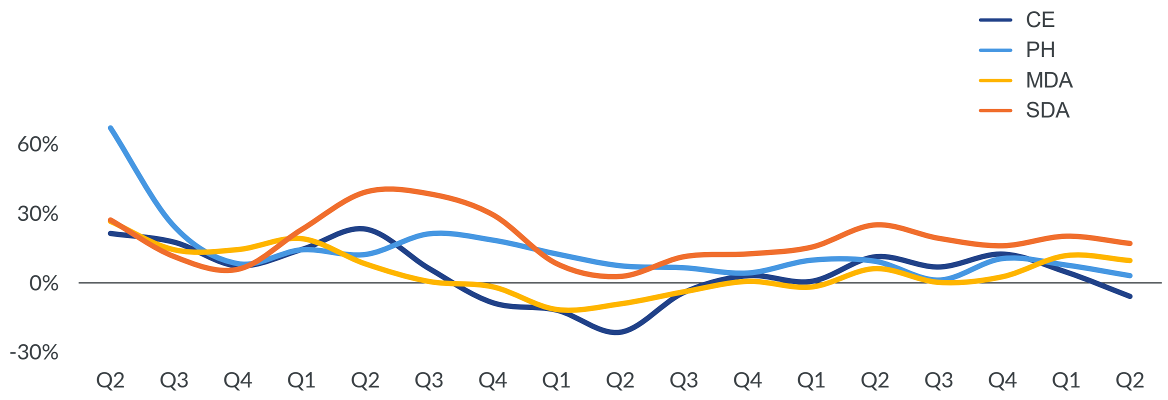
YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- Electric fryers boom
  The small domestic appliances sector saw a dramatic 117% increase in electric fryers' sales, achieving 155M PLN in Q2. This surge suggests strong consumer interest in convenient cooking solutions, possibly driven by seasonal trends or promotional campaigns.
- Mobile computing momentum
  In information tech./gaming hardware, mobile computing grew by nearly 29%, from 810M PLN to 1043M PLN. This reflects sustained demand for laptops and portable devices, likely fueled by hybrid work and education needs.
- Hot beverage makers rise
  Sales of hot beverage makers in small domestic appliances rose by 20%, from 305M PLN to 365M PLN. This suggests continued consumer investment in home comfort and lifestyle appliances.
- Wearables losing steam
  The telecom segment of core wearables declined by nearly 13%, from 415M PLN to 361M PLN. This may signal a plateau in consumer adoption or delayed upgrade cycles.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Poland

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Ukraine

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APAC

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Spotlight on GfK Consumer Climate and T&D in Poland

Poland

Contact person:
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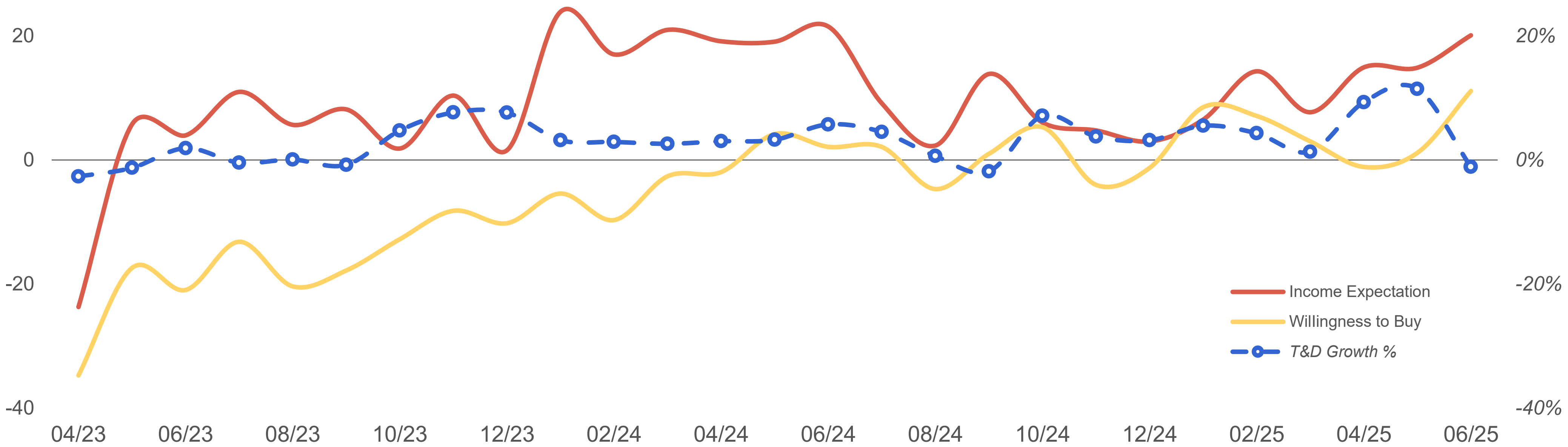
Monthly Index Income Expectation & Willingness to Buy & Growth Rate T&D % YoY (T&D)



GfK Consumer Climate – Reading example

If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

Helicopter View Romania

Romania
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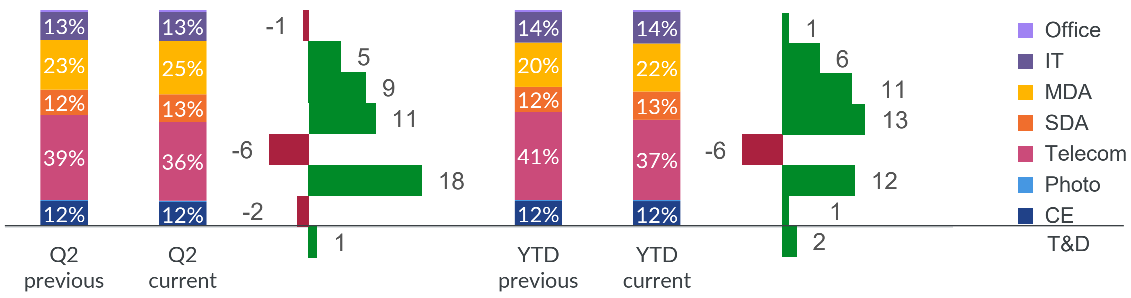
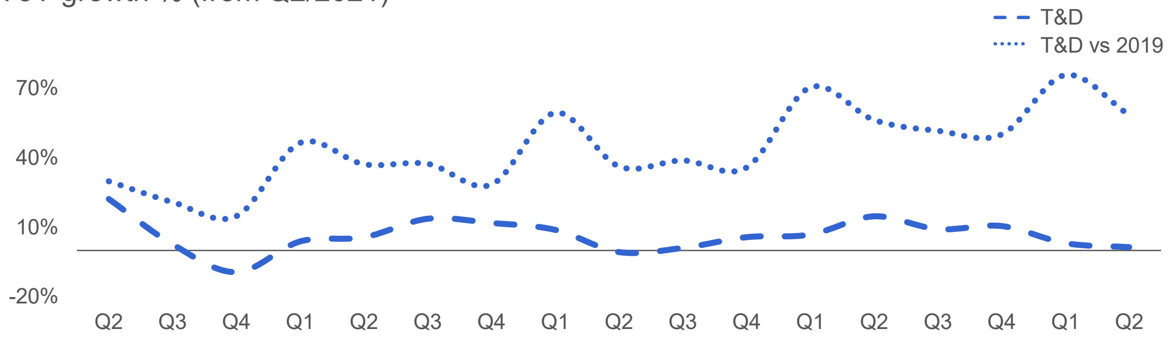
Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The Tech & Durables market in Romania showed a slight increase in Q2 2025, both in units and value. The market increased by +3% in terms of volume vs the previous year.
- In Q2, most sectors registered positive evolutions in terms of value and volume, except office and consumer electronics dropping in value, and telecom losing volume as well.
- Romania’s annual inflation rate increased in Q2 2025, with increases in consumer prices, particularly notable for food and services.

Channel Dynamics

- The telecom sector remained the only sector with a negative development in value in HY1 2025.
- TCR remained the main driver of the decrease in Q2, but also in the YTD development. Open market showed a decreasing trend with a higher decrease in Q2 compared to the YTD evolution (both compared to previous year).

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office; channels reported for telecom sector only - for further information please contact your local key account manager

Helicopter View Romania

Romania
Contact person:
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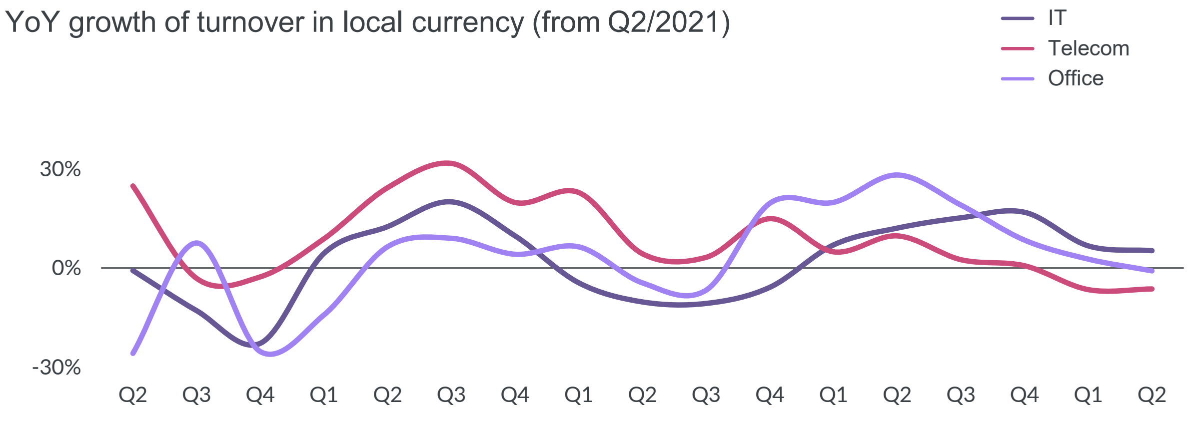
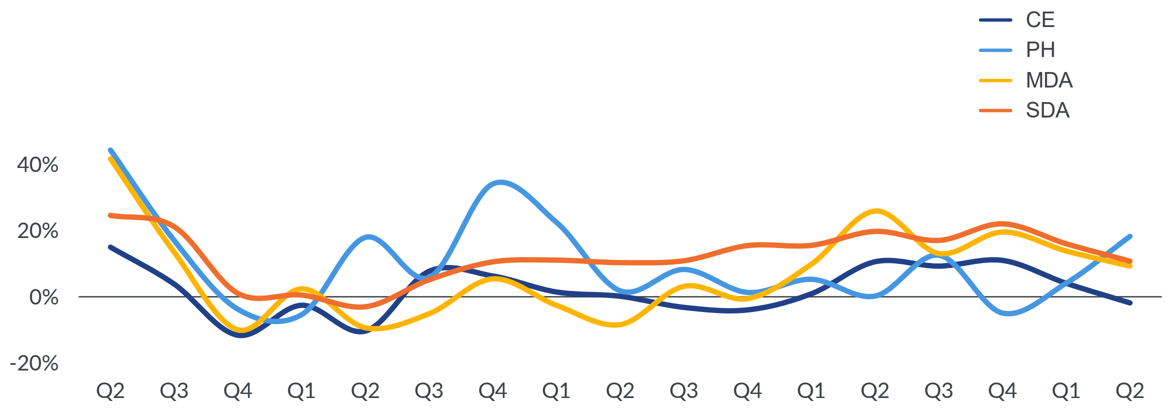
YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- In Q2, the SDA sector had a positive performance (+11%), driven by hot beverage makers, shavers, vacuum cleaners, and dental care products. Juicers and irons had a negative performance in Q2 2025, in both units and value.
- The IT sector registered a positive development for all categories, at +5% in value. Sales volume increased as well, with strong evolutions for peripherals. Mobile computing remained relatively flat, while desk computing registered decreases. The office sector remained flat in volume, with value growth for printers, slowing down the revenue decrease for the sector.
- MDA delivered a strong performance in Q2, at +9% in value and +7% in volume. All core categories accelerated, with the highest increases seen for air conditioners, cooling, washing machines, and tumble dryers. However, cooking and cooling slightly decreased in volume.
- In Q2 2025, the telecom sector registered a decrease of -6%. This trend was mainly triggered by evolution of smartphones, but core wearables delivered a negative trend as well.
- CE increased by +1% in volume but declined in value due to the negative performance of PTV. Mini Bluetooth speakers, loudspeakers, and audio home systems registered growth in both volume and value, while headsets growth was seen only in value.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office; channels reported for telecom sector only - for further information please contact your local key account manager

Helicopter View Ukraine

Ukraine
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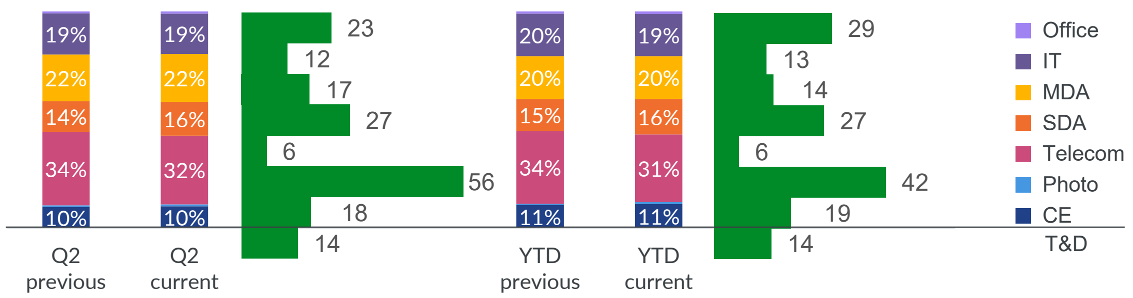
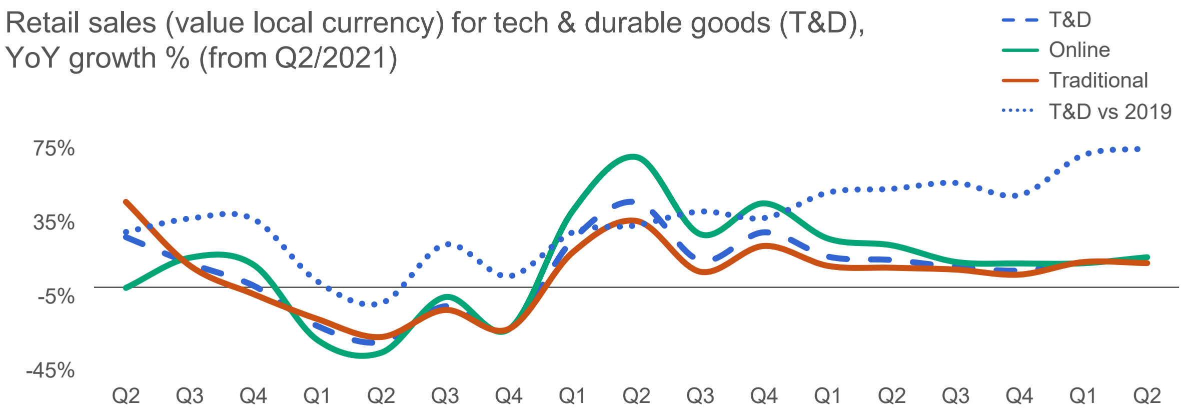
Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- Telecom grew by just 6% YoY in Q2, while the overall market increased by 14% in LC. The main impact came from weak offline sales growth of smart mobile phones (+5%). Core wearables showed the highest growth in online sales, reaching +16%.
- In Q2 2025, MDA accelerated at +9% in units and +14% in value (UAH), while price increase in LC slowed to +4%.
- SDA sales rose by 13% in units and 27% in value, driven by strong demand for innovative products like handstick and robot vacuum cleaners, air fryers, and hair care.
- IT delivered a moderate +12% YoY growth in Q2, driven by strong performances in monitors (+42%) and video game consoles (+51%). Mobile computing, the core category, delivered the weakest growth at just 4.5%.
- CE outpaced the market at +18% YoY, driven primarily by the key category PTV, which also rose 18%. Loudspeakers (+42%) and audio home systems (+41%) were standout performers, while headphones recorded the weakest growth at 8%.

Channel Dynamics

- In Q2 2025, online sales once again outpaced traditional channels and effectively became the main driver of the market.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Ukraine

Ukraine
Contact person:
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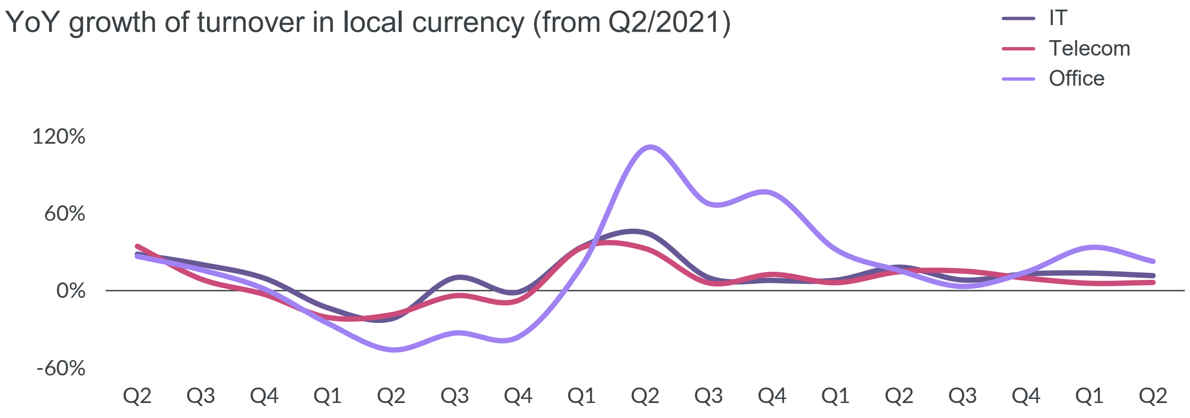
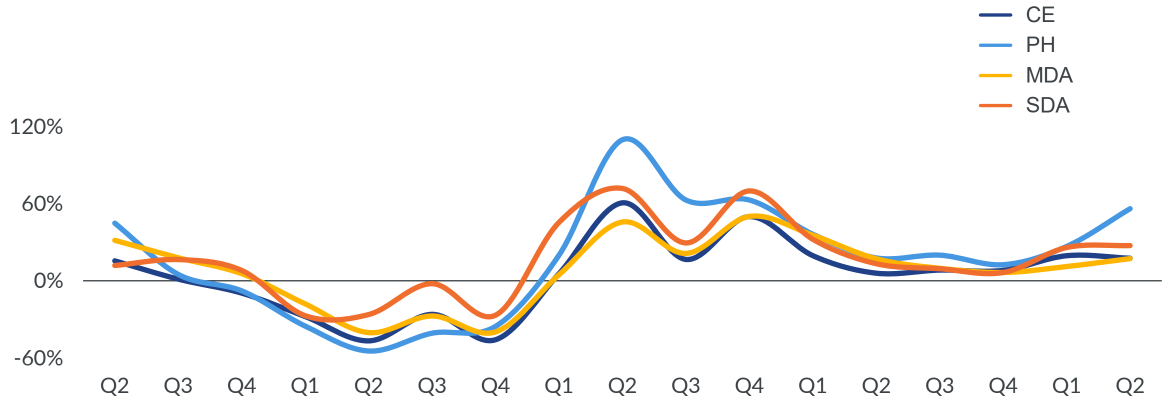
YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- Smartphones with battery capacity over 5000 mAh saw a 201% surge in sales, while all other segments declined. Within smartwatches, the eSIM-only-segment grew by 52%.
- In mobile computing, gaming laptops grew by 14%, while laptops with Qualcomm processors surged over 1000%. Among monitors, the 19 to 23”-segment led the growth, at +75%. Gaming-capable laptops saw the weakest performance, declining by 47%.
- MDA growth was mainly driven by low-penetration categories such as dishwashers and tumble dryers. Among core categories, washing machines performed strongly (+9%), while refrigerators, affected by seasonal trends, grew by 4% in units.
- PTVs featuring advanced technologies drove market growth: QD without MiniLED rose by 48%, QD with MiniLED by 76%, and OLED by 189%. Models with a screen size above 89” led at 111% growth, though unit volumes remained relatively low.
- Fryers and hair stylers remained the fastest-growing SDA categories, with value growth of 235% and 60%, respectively. Juicers, presses, and sandwich/waffle/grills were slightly negatively impacted.

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Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Sectors returned to growth across major countries. Geopolitical tensions continued to loom.

Middle East, Turkey & Africa
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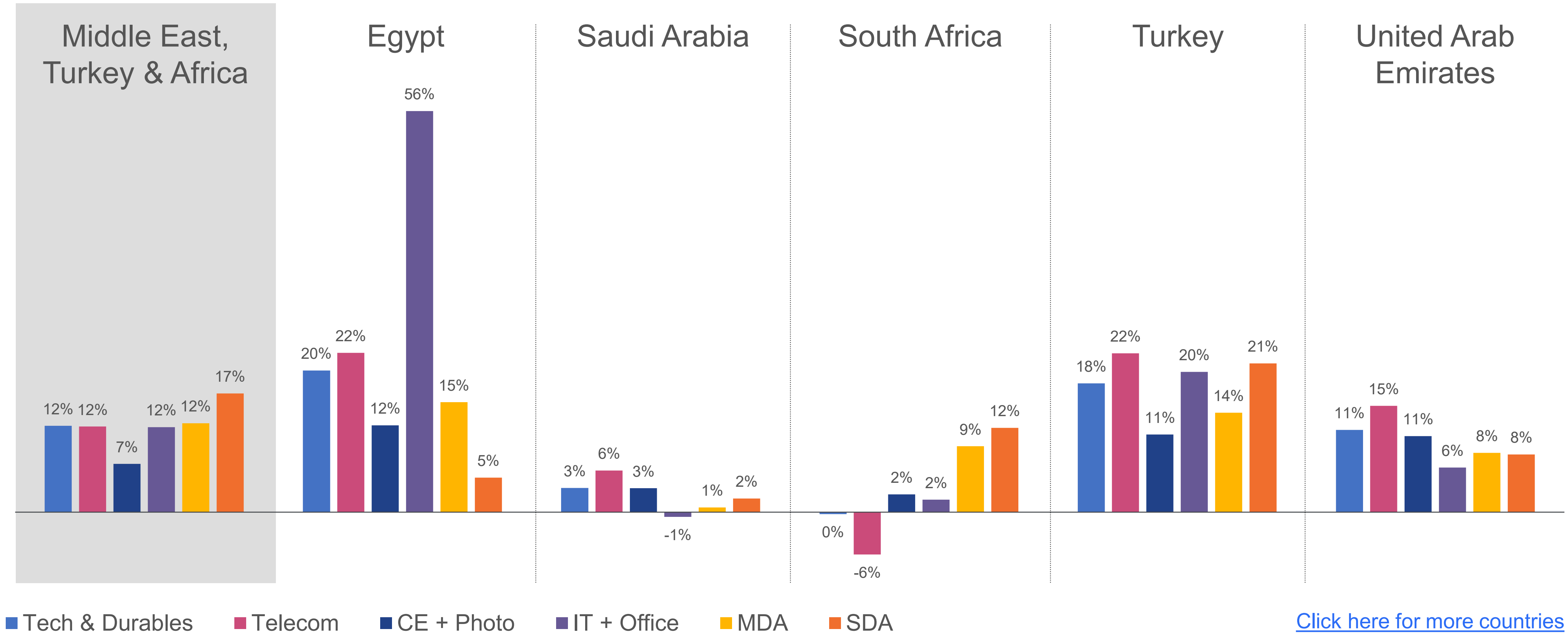
Nicolet.Pienaar

USD growth % YoY Q2/2025



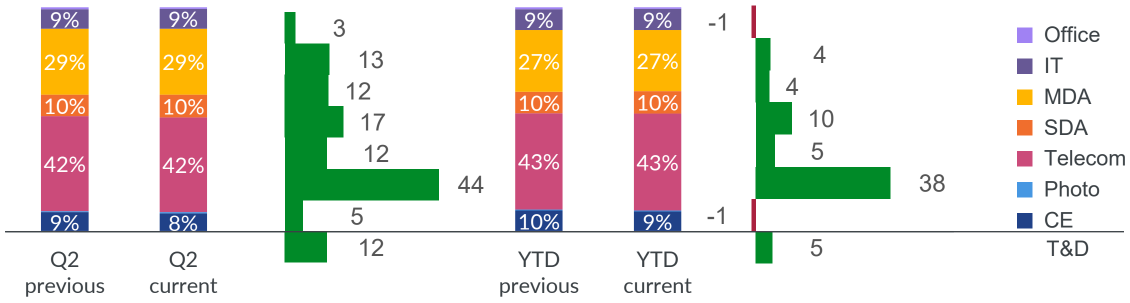
Click here for more countries

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | META: AE EG IL IQ MA OM PK SA TR ZA

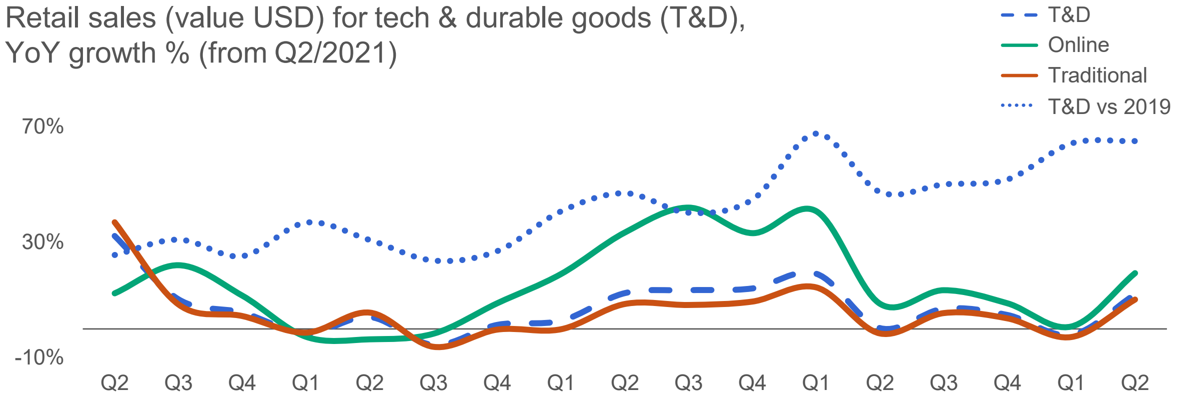
Helicopter View Middle East, Turkey & Africa

Middle East, Turkey & Africa
Contact person: **Nicolet Pienaar** (MI Lead)
Nicolet.Pienaar

Consumer basket and spending (value USD) for tech & durable goods (T&D), YoY growth %



Retail sales (value USD) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The Tech & Durables market across META markets realized a modest growth of +5% YTD year-on-year.
- The office sector posted a decline of -1% YTD, majorly owing to a -22% drop in South Africa, while other countries witnessed growth.
- The photo sector delivered +38% growth in YTD 2025, stemming from growth across key markets. A +63% growth was seen in Turkey.
- The IT and MDA sectors performed much better in Q2 2025 vs Q2 2024, with stable growth of +4% YTD.

Channel Dynamics

- The online channel stabilized following strong growth since 2020.
- Both online and offline channels witnessed similar trends of growth post Q1 2025 as consumer demand picked up across regions.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | META: AE EG IL IQ MA OM PK SA TR ZA

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Helicopter View Middle East, Turkey & Africa

Middle East, Turkey & Africa
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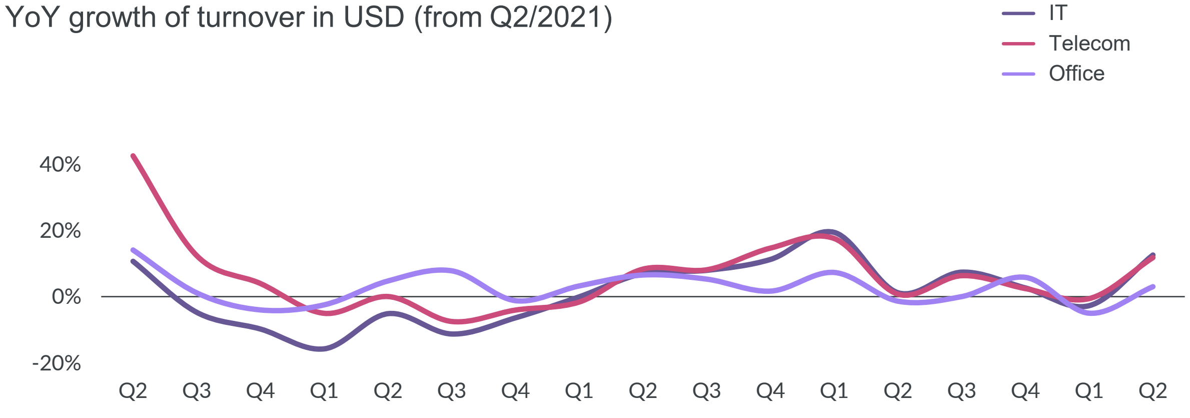
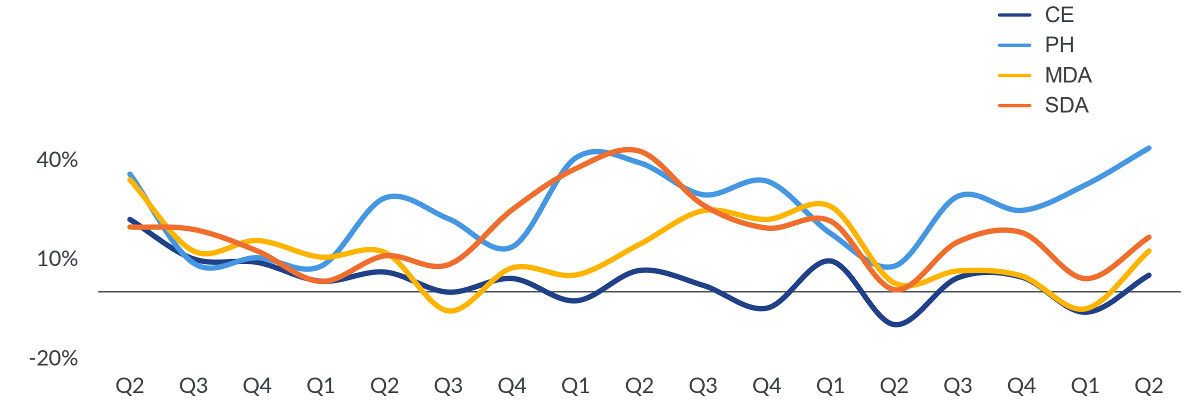
YoY growth of turnover in USD (from Q2/2021)





Growing & declining product segments

- The telecom sector experienced a slight YoY gain in Q2 2025, following the drop in Q1 2025. This incline was driven by a significant increment in demand for premium products and through new product launches.
- In the IT sector, Egypt, South Africa, and Turkey showcased great signs of strengthening while slowdown was seen in Saudi Arabia.
- In the MDA sector, mainly Turkey and Egypt contributed significantly to growth. Other nations majorly showed stable, single-digit YoY growth.
- CE regained some momentum after its downward trend, with slight stabilization observed in Saudi Arabia and the UAE and good performance in Turkey and South Africa.
- The SDA sector saw a +16.5% YoY market growth, driven by a consumer shift toward personal and home care products.
- The OE category faced challenges across the META region as demand for key categories slowed down. This was felt across the region, with growth seen only in Turkey and UAE.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | META: AE EG IL IQ MA OM PK SA TR ZA

Helicopter View Egypt

Egypt
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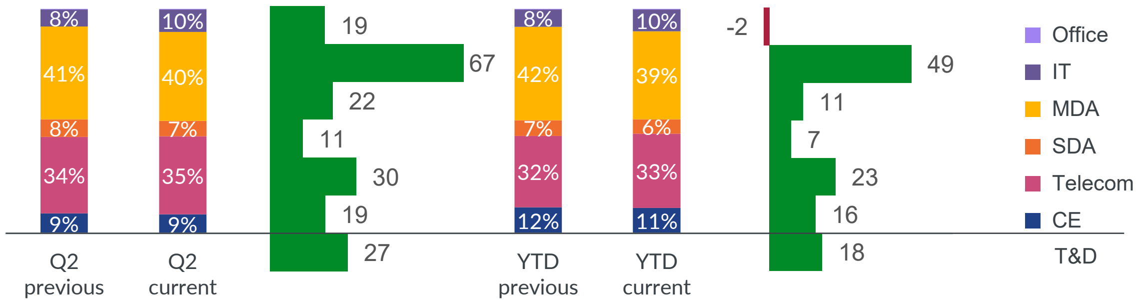
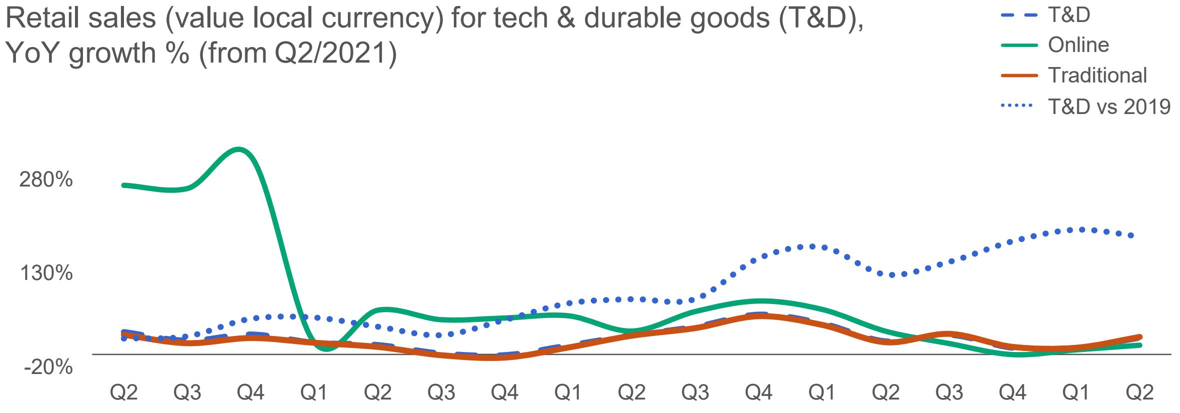
Dina.AbdelGhany

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The annual urban inflation rate in Egypt cooled down to 14.9% in June 2025 from 16.8% in May, coming in below the expected 16.2% and breaking a three-month uptrend. Price increases for food and beverages decelerated to 6.9% in June from 11.2% in May, though fuel costs remained elevated due to April's energy price hikes of up to 15%.
- The Egyptian T&D market started to slightly pick up from February 2025 onwards.
- In Q2 2025, the Tech & Durables market witnessed a volume recovery of 3% compared to Q1 2025, driven by growth of home climate control (76%) and telecom sectors (15%) as the climate change in Egypt has affected the demand on air conditioners in 2025.

Channel Dynamics

- Following the promotional period in Q1, chains continued to face pressure, indicating a slowdown in momentum. In contrast, independents gained traction, growing by 14% vs Q1 2025.
- Offline rebounded vs Q1 2025, driven by strong home climate control demand. Online dropped by 20%, reflecting post-promo period and shifting consumer habits.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Egypt

Egypt
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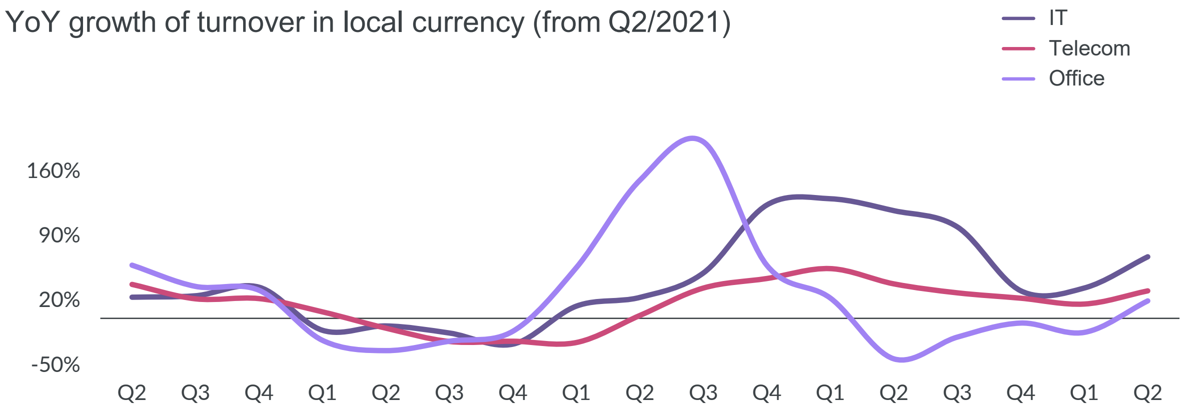
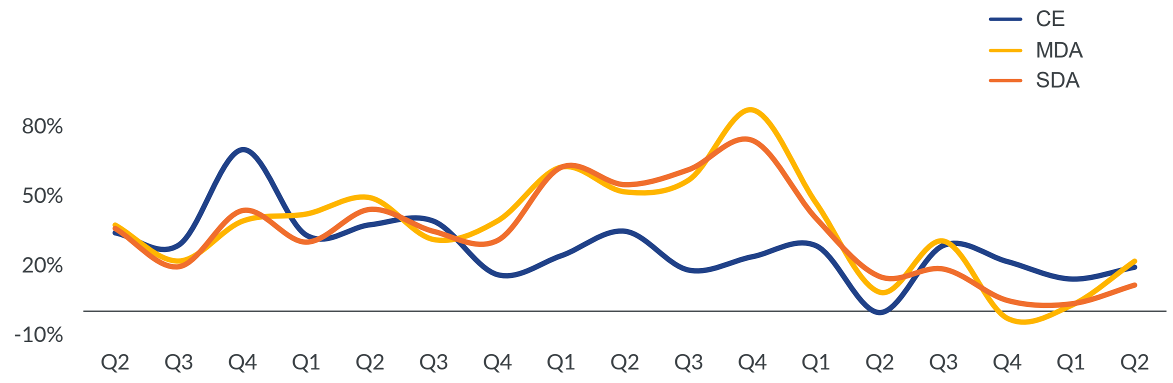
YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- The IT sector grew 4% in volume, signaling a recovery after the Q1 2025 dip, though at a slower pace due to weaker media tablet sales.
- Telecom saw stronger momentum, with value up 15% and volume rising 8%, fueled by Samsung's strong phablet performance.
- Home climate control continued to grow, driven by increased AC demand vs PY (seasonal product group).
- MDA declined 15.5% in volume vs Q1 2025, with drops across all categories, while SDA fell by 10%.
- CE saw the sharpest drop, down 40% in volume vs Q1 2025, following prior strong quarters led by a drop in Samsung small-screen PTVs.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Saudi Arabia

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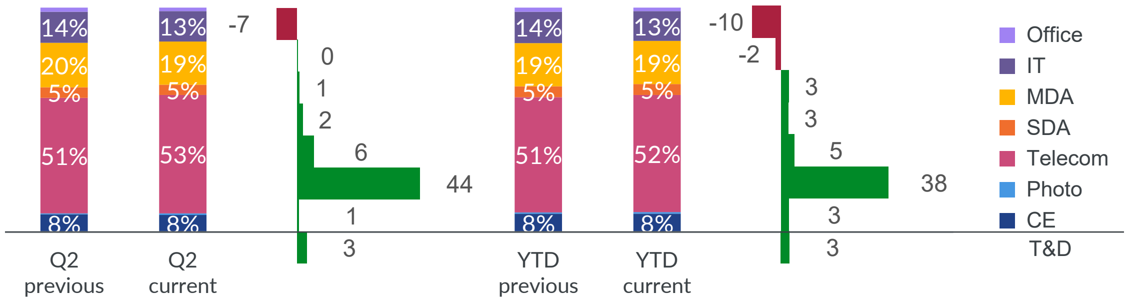
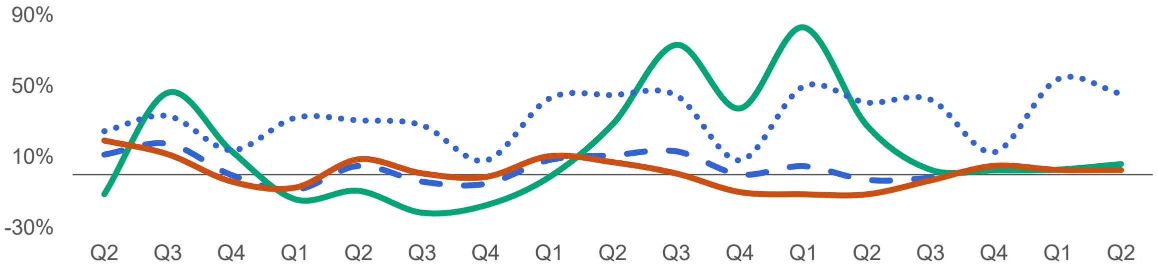
(MI Lead)

Nicolet.Pienaar

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The T&D market maintained a stable growth trajectory with a 3% increase in Q2.
- Office faced a downturn, declining by 7% in Q2, likely due to reduced corporate spending and slower commercial activity.
- IT showed no movement in Q2 but experienced a 2% drop in HY1.
- MDA registered growth of 1% in Q2 and 3% overall in HY1 2025.
- SDA continued its upward momentum with healthy growth in both Q2 and HY1.
- Telecom led the market with a 6% growth in the second quarter among the main sectors.
- Growth within CE slowed down in Q2 with a modest 1% uplift YoY.

Channel Dynamics

- The growth rates of the online channel slowed down after extraordinary increases in 2024.
- The offline market recovered from the decline experienced a year ago.

Source: GfK Market Intelligence: Sales Tracking, Panelmarket incl. Expansion, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Helicopter View Saudi Arabia

Saudi Arabia

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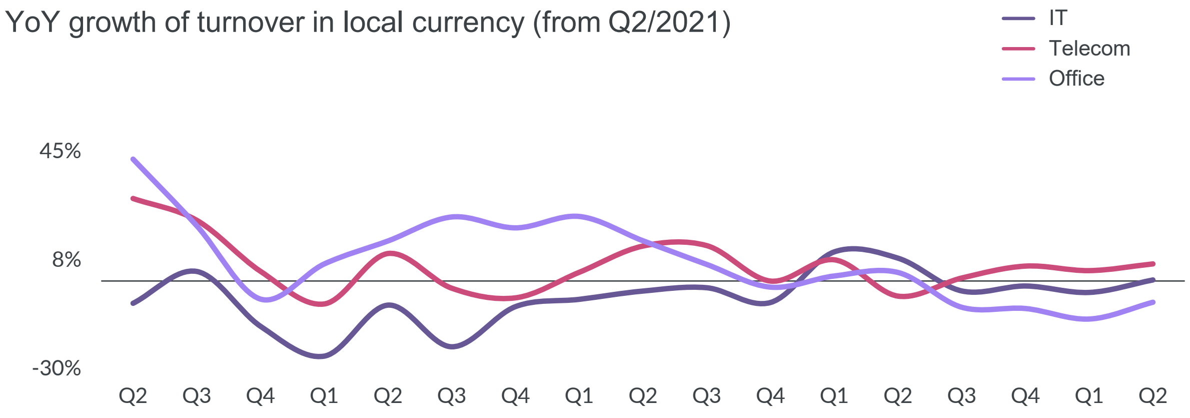
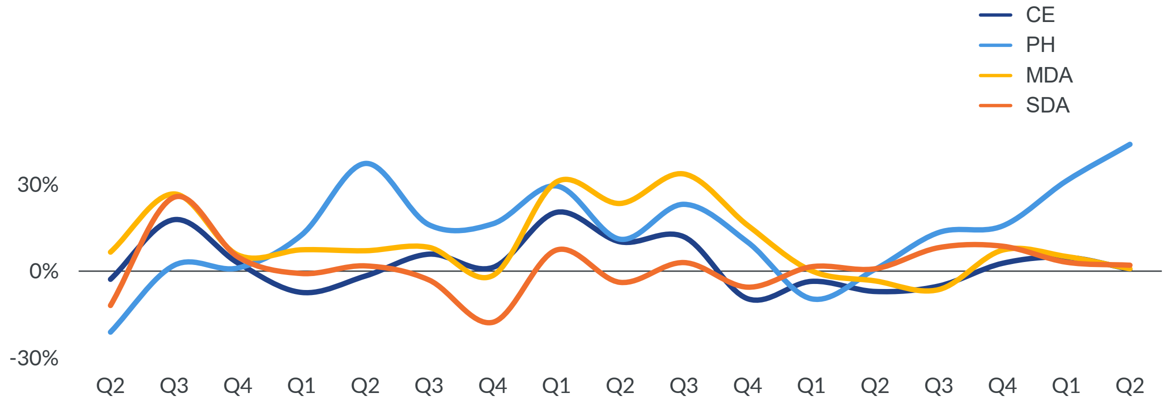
YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

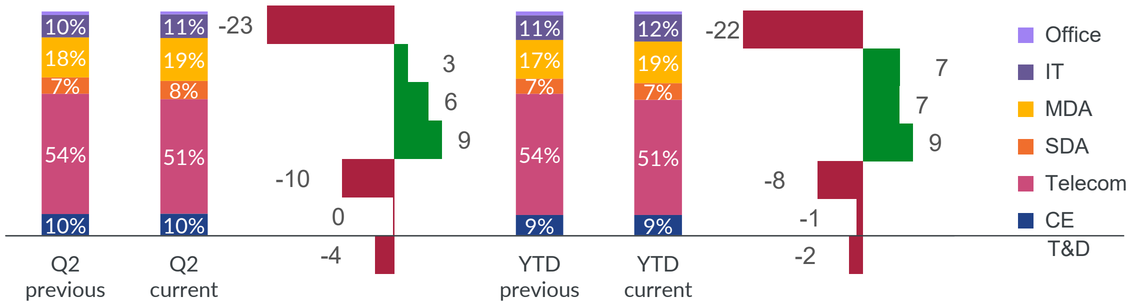
- The IT sector remained stable due to a bounce back performance from mobile computing. Monitors and media tablets created growth impulses for the sector.
- The office sector remained in decline during Q2, with all product categories posting negative trends.
- Telecom growth was fueled by steady gains in smartphones and a strong double-digit surge in core wearables.
- Mini Bluetooth speakers, headsets, and loudspeakers created an uplift for the CE sector, whereas TVs declined.
- The MDA sector saw strong growth coming from dishwashers. Cooking appliances, microwave ovens, and washing machines also increased revenue YoY, while the other segments regressed.
- SDA was driven by vacuum cleaners, steam cleaners, shavers, irons, and hair dryers. Fryers and food preparation appliances continued to be under pressure from a value perspective.

Source: GfK Market Intelligence: Sales Tracking, Panelmarket incl. Expansion, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

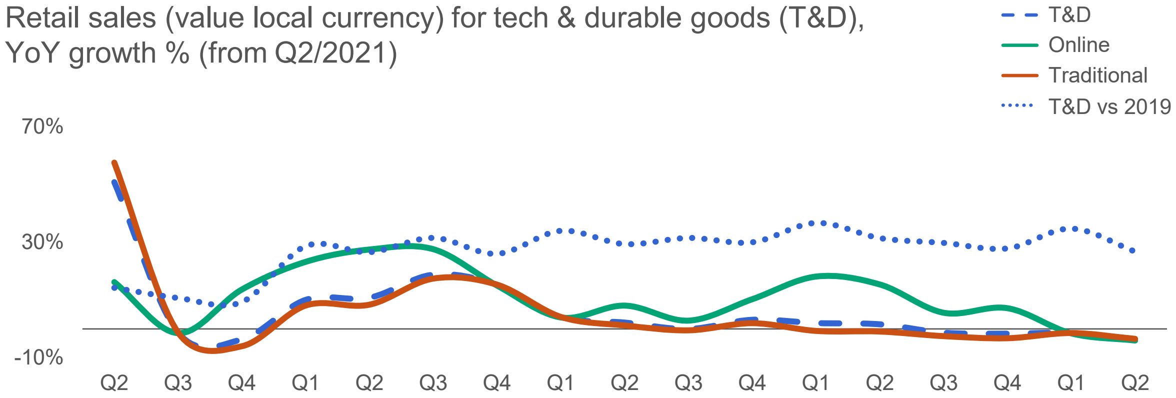
Helicopter View South Africa

South Africa
Contact person: **Nicolet Pienaar** (MI Lead)
Nicolet Pienaar

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- Q2 marked a modest recovery for South Africa’s Tech & Durables industry, with selective category growth offsetting continued pressure in value performance.
- Innovation, seasonal demand, and competitive pricing helped to drive volume in key areas, while overall market value remained constrained by price erosion and shifting consumer preferences.
- Competitive intensity from Chinese brands continued to reshape market dynamics, with affordability and feature-rich offerings gaining traction. Despite pockets of growth, the industry remained in a transitional phase, balancing consumer demand with evolving product strategies and pricing pressures.

Channel Dynamics

- Online sales continued to decline this quarter, primarily driven by underperformance in the telecom and office sectors. While home-based T&D products experienced steady growth, this momentum was not sufficient to offset the broader market downturn.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Helicopter View South Africa

South Africa

Contact person:
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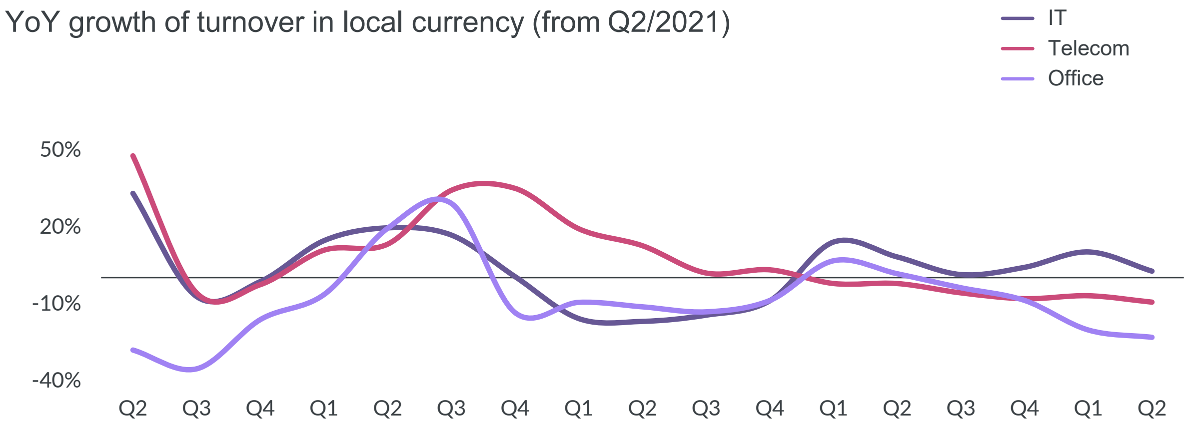
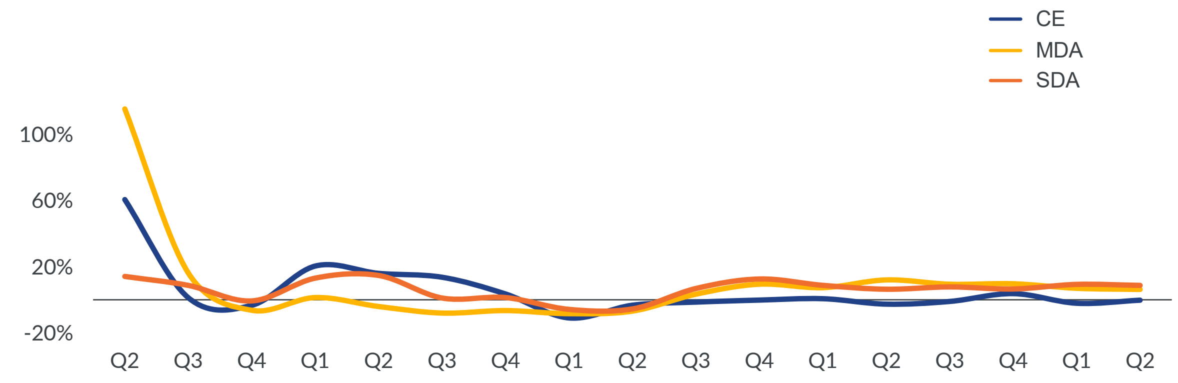
(MI Lead)

Nicolet Pienaar

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

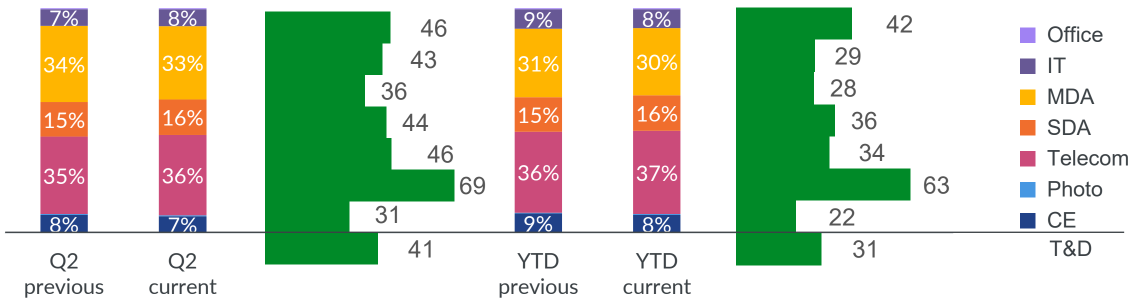
- The IT sector delivered a robust 14% growth, driven by innovation in hardware and network communication. This surge reflects growing demand for laptops, monitors, and internet solutions, particularly among gamers and home professionals seeking enhanced screen setups and reliable connectivity.
- SMP unit sales showed signs of recovery, supported by double-digit price reductions. However, overall market value remained down YTD. Growth was led by the prepaid segment, despite falling ASP.
- CE declined marginally, negatively impacted by soundbars and MBS. While price increases in PTV helped slight value growth, weak demand limited unit sales. Strong performance in QLED and MiniLED was supported by heightened competition, which also drove down ASPs in the premium segment.
- MDA saw solid growth in Q2, led by strong demand for cooking, tumble dryers, and washing machines. Cooling underperformed due to price erosion and discounting, while competitors gained share through aggressive pricing and expansion in the premium tier.
- SDA maintained a healthy 4% volume growth, fueled by strong demand in personal care, kitchen appliances, and winter heating. Personal care continued to benefit from self-care trends and product innovation, while kitchen appliances saw increased interest from consumers investing in home cooking and lifestyle upgrades.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

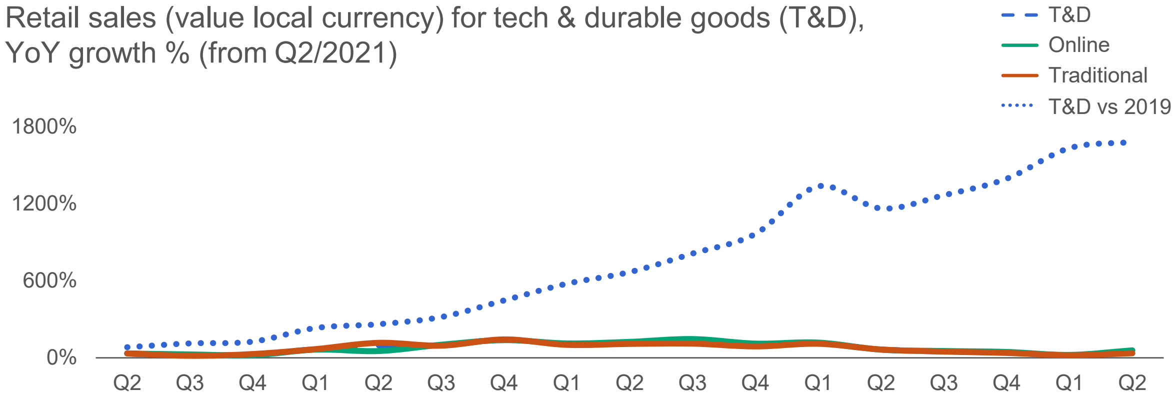
Helicopter View Turkey

Turkey
Contact person:
Berk Ozdemir
(MI Lead)
Berk.Ozdemir

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- While the second quarter of last year was weak following a strong Q1, this year saw growth in Q2 driven by the low base effect and the positive impact of SDA and telecom.

Channel Dynamics

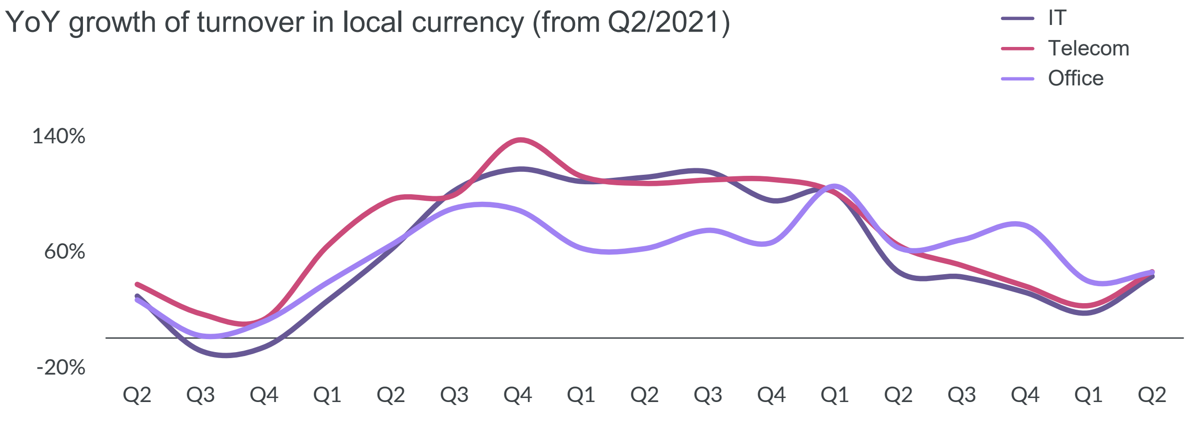
- While traditional sales grew by 13% in USD in Q2 2025, online sales grew by 32%.
- In Q2, the total market increased by 18% in USD and units were up 6%.

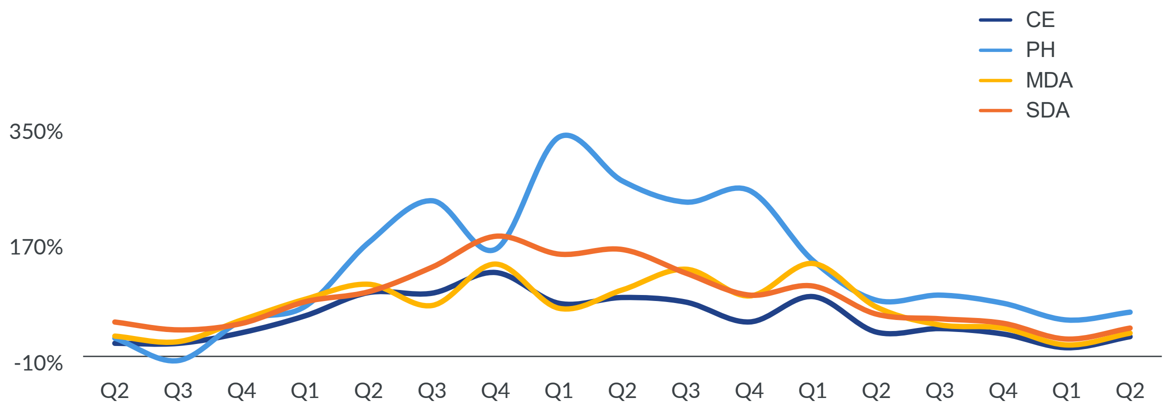
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Turkey

Turkey
Contact person:
Berk Ozdemir
(MI Lead)
Berk.Ozdemir

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

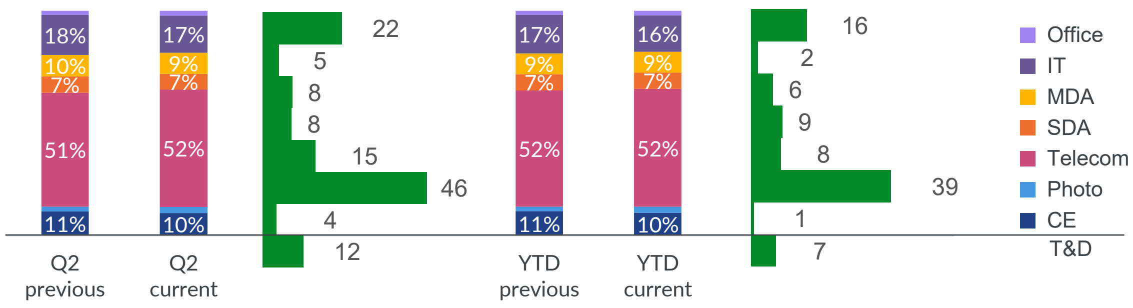
- The IT industry overall experienced growth in revenue, at 19%. While all product groups were positive, media tablets were the fastest-growing category after visual cams, growing by 36%.
- The office sector grew by 22% in revenue and 3% in units. Laser cartridges showed a negative trend of -6% in revenue and -12% in units. Inkjet SF printers were the strongest category.
- Telecom grew 22% in value YoY while units remained flat. Smartphones led at 24% value growth. Headsets posted 7% value growth despite shrinking units, while core wearables continued to decline in both value (-7%) and unit (-21%). Mobile phones were up 26% in terms of value despite a drop in units.
- MDA grew by 18% USD, led by hobs (+41%), hoods, tumble dryers, and dishwashers. Washing machines with 10+ kg capacity grew by 28%, while the 8 kg segment declined by 9%. 10+ kg tumble dryers surged by 84% in USD terms .
- Consumer electronics rose by 11% in value. Audio home systems were the strongest category, at +27%. Within PTV, 70"+ screens jumped 44%, and 51"-59" screens recovered at +8.5% after last quarter's decline.
- The SDA sector increased by 21%. Top performers included shavers (+54%), hair stylers (+34%), and vacuum cleaners (+31%). Electric fryers continued to decline (-68%). Within shavers, ladies' LAS/IPL posted a plus of 83% in value.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

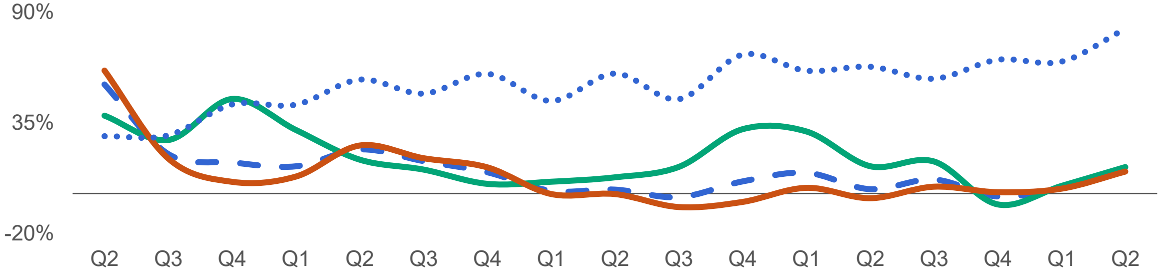
Helicopter View United Arab Emirates

United Arab Emirates
Contact person: **Nicolet Pienaar** (MI Lead)
Nicolet.Pienaar

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The Tech & Durables category surged ahead with a 12% boost in Q2 and a solid 7% YTD growth over last year.
- The IT market achieved a 5% growth in Q2 and 2% YTD, rebounding after a slow start in Q1.
- The photo category saw impressive growth, fueled by a tourism boom across the region.
- MDA continued their upward trend with an increase of 8% in Q2.
- SDA continued their winning streak with 9% growth YoY, driven by robust consumer demand in premium segments.
- The telecom sector remained the largest contributor, registering a significant 15% growth in Q2 compared to 2024.
- CE maintained a stable performance, posting growth of 4%.

Channel Dynamics

- After a dip in Q4 2024, both online and offline channels made a strong comeback, gaining momentum in Q2 as consumer demand surged – signaling a vibrant and resilient retail landscape.

Source: GfK Market Intelligence: Sales Tracking, Panelmarket incl. Expansion, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View United Arab Emirates

United Arab Emirates
Contact person:
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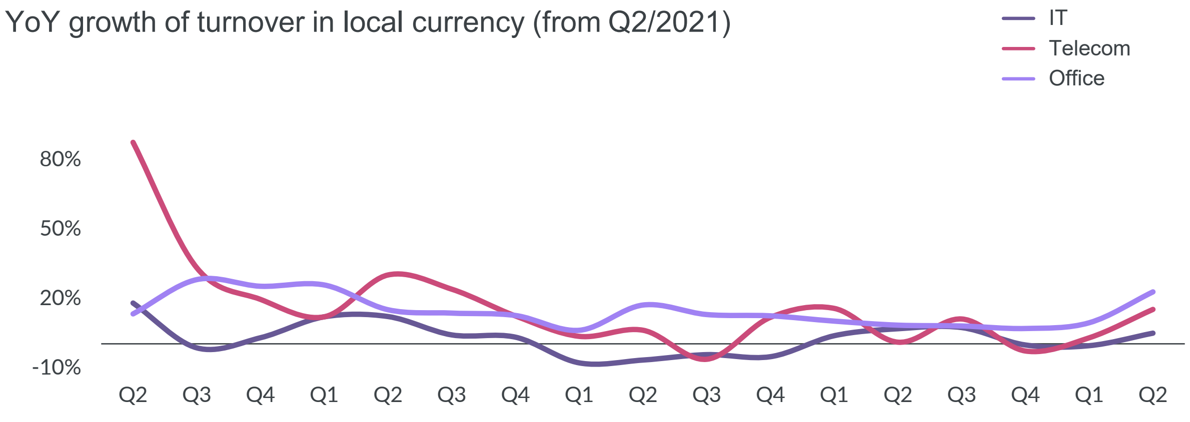
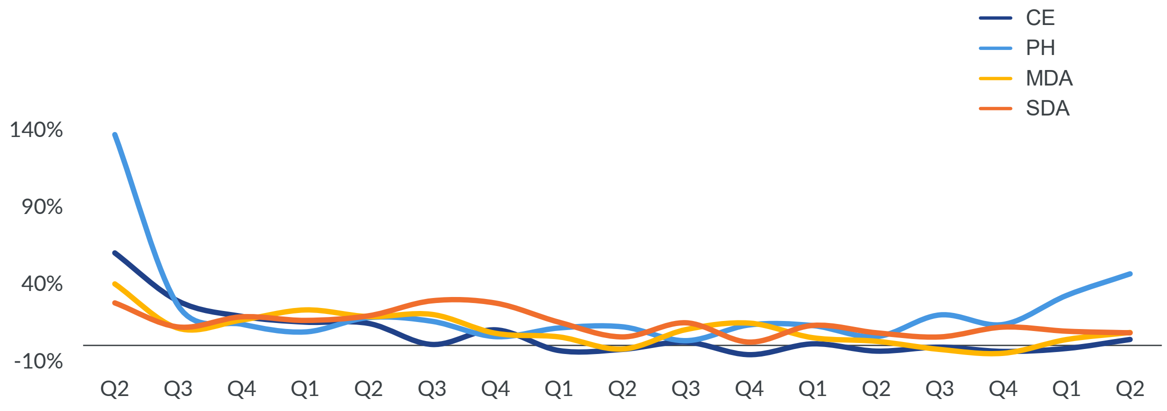
(MI Lead)
Nicolet.Pienaar

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

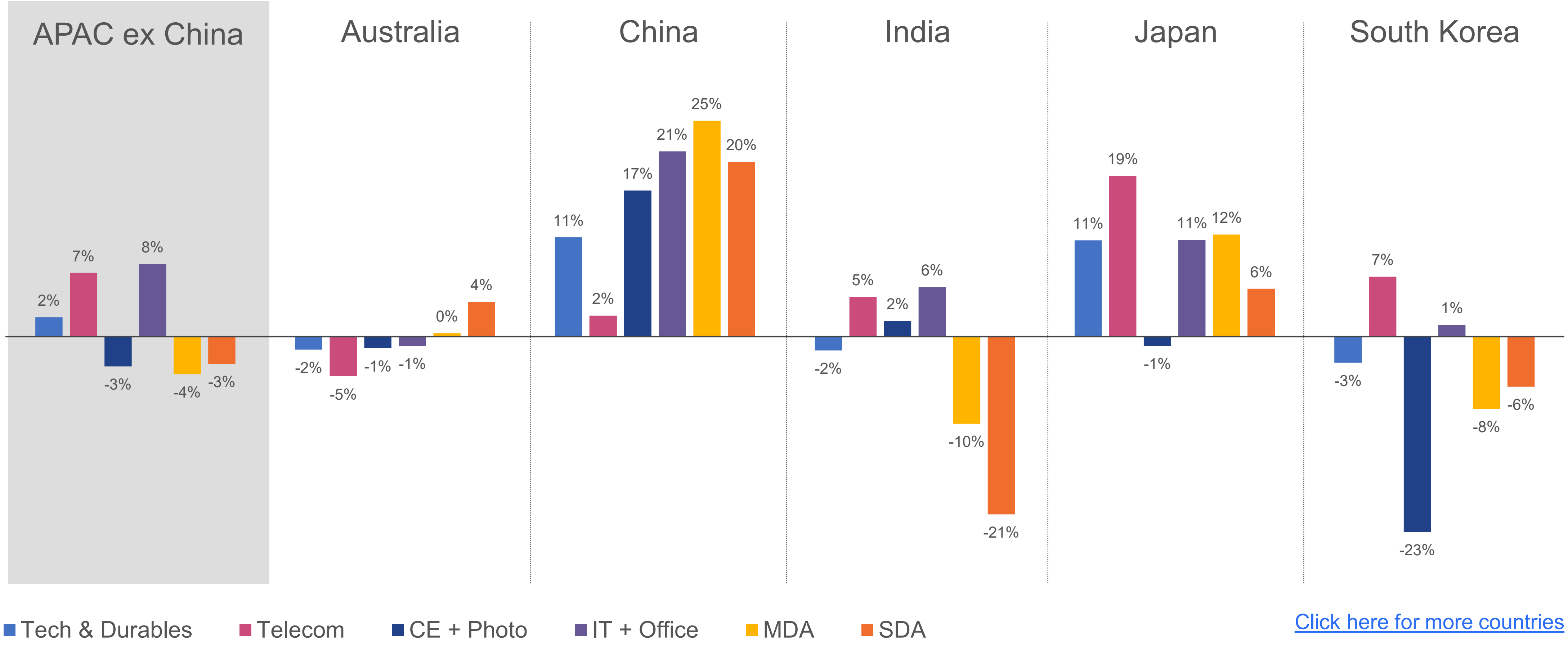
- The IT sector's growth was largely fueled by general momentum, with desktop computers performing particularly well. However, the mobile computing segment held steady, showing no significant changes.
- All office categories contributed to the positive momentum within the sector.
- The telecom sector experienced growth, driven by an upward momentum in the performance of larger screen smartphones.
- The CE sector saw an increase across most sub-segments with the exception of Mini Bluetooth speakers, which demonstrated a decrease.
- Within MDA, all the categories experienced growth in Q2.
- In the SDA sector, all categories posted growth in Q2, except for fryers and hair stylers. Key drivers of value growth in the sector included vacuum cleaners, hot beverage makers, and food preparation appliances.
- The photo sector showed robust growth fueled by the strong performance of camcorders and digital cameras.

Source: GfK Market Intelligence: Sales Tracking, Panelmarket incl. Expansion, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

China outperformed the region dynamic, driven by the subsidy program.

APAC ex China
Contact person:
Mukund Tripathi
(MI Lead)
Mukund.Tripathi

USD growth % YoY Q2/2025



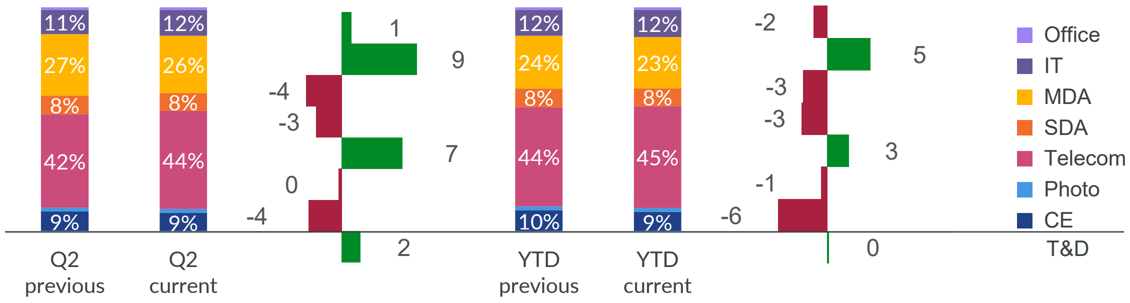
Click here for more countries

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | APAC ex CN: AU NZ HK ID IN JP KH KR MM MO MY PH SG TH TW VN

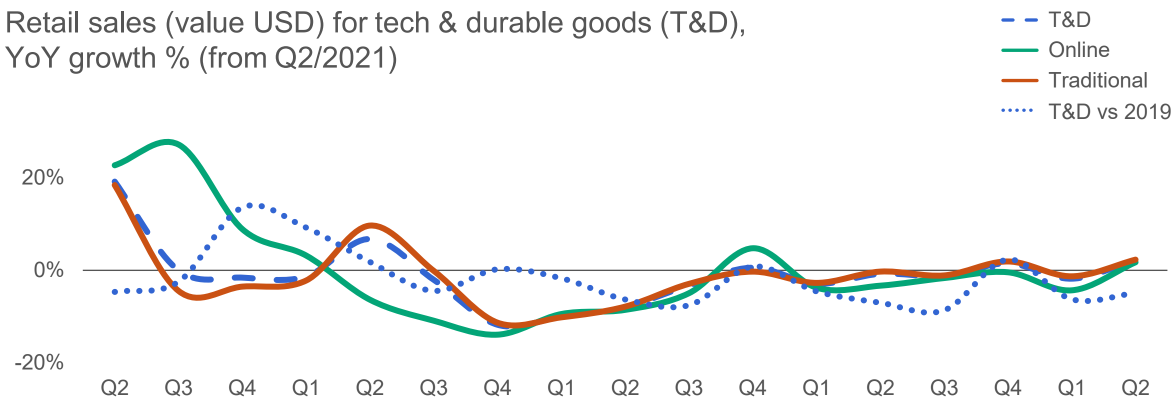
Helicopter View APAC ex China

APAC ex China
Contact person:
Mukund Tripathi
(MI Lead)
Mukund.Tripathi

Consumer basket and spending (value USD) for tech & durable goods (T&D), YoY growth %



Retail sales (value USD) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The APAC Tech & Durables market saw growth in total T&D in Q2 2025, an improvement compared to Q1 2025.
- Growth was led by the IT and telecom sectors, which performed well due to innovation and hype around AI-enabled features. However, other sectors such as domestic appliances and consumer electronics continued to see a slowdown due to economic uncertainty, inflationary pressures, and market saturation.
- In general, we also see value growth higher than unit growth across markets, suggesting premium segments continued to be resilient due to growing middle class in developing markets and continued resilient spending from higher income groups in developed markets.

Channel Dynamics

- Offline channels mostly returned to pre-pandemic levels, while the contribution of online channels stabilized. Growth in overall T&D is all-encompassing across both offline and online channels.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | APAC ex CN: AU NZ HK ID IN JP KH KR MM MO MY PH SG TH TW VN

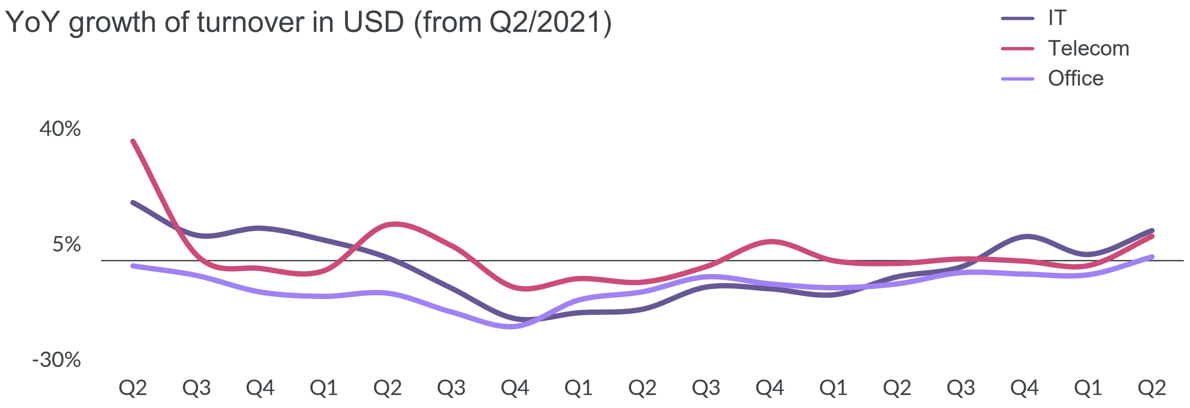
World
Western Europe
Eastern Europe
Middle East, Turkey & Africa
APAC
Australia
China
India
Japan
South Korea
Latin America

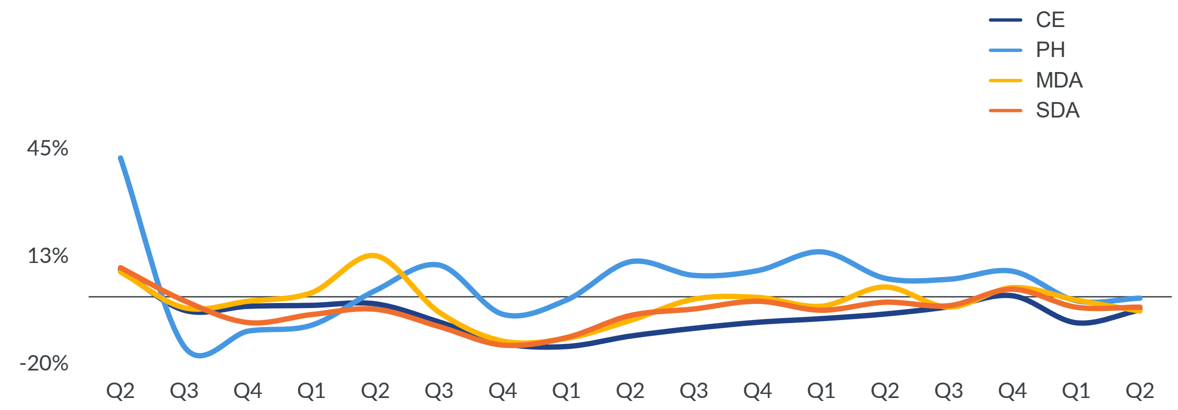
PREV NEXT

Helicopter View APAC ex China

APAC ex China
Contact person:
Mukund Tripathi
(MI Lead)
Mukund.Tripathi

YoY growth of turnover in USD (from Q2/2021)





Growing & declining product segments

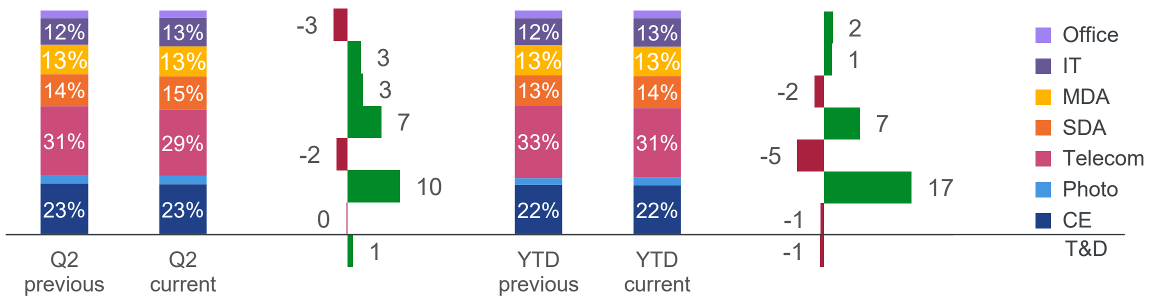
- The IT sector saw healthy growth in Q2 2025 led by strong growth in mobile computing due to the replacement of PCs following the end of the support for Windows 10 and the replacement cycle of PCs coming up from Covid spike.
- The telecom sector showed strong growth this quarter with the launch of new products and the promotion of AI-enabled features within smartphone categories.
- MDA declined due to a high base in Q2 2024 which had a higher demand due to the heat wave, e.g., in SEA. However, this year the temperatures are lower with more rain events in these markets, leading to a slowdown of air conditioners.
- The CE sector continued to decline across most markets due to high penetration levels. Replacement cycles were driven by interest toward newer screen technologies, such as MiniLed in TVs.
- SDA declined mainly in South-East Asia and North-East Asia. Decline was observed across several product groups, including vacuum cleaners, air treatment, and hair care. In contrast, electric fryers remained a standout category showing continued growth.
- Photo saw a slowdown in growth in 2025 after strong growth in the past 2 years, due to a stabilization of the market where the post-pandemic recovery relatively muted.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | APAC ex CN: AU NZ HK ID IN JP KH KR MM MO MY PH SG TH TW VN

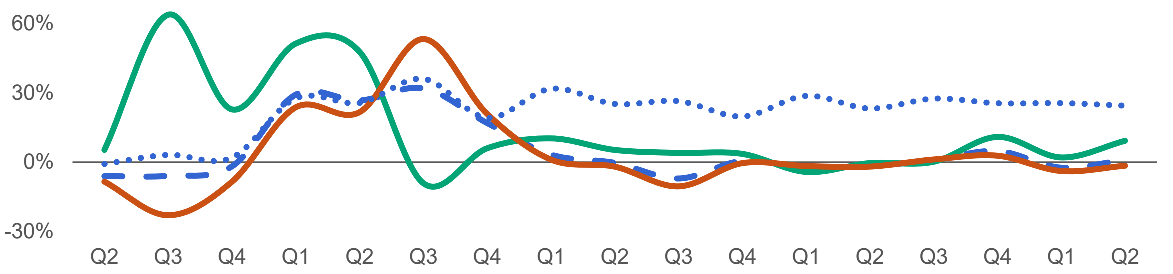
Helicopter View Australia

Australia
Contact person: **Brendan Dowd** (MI Lead)
Brendan.Dowd

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- Q2 2025 saw the overall T&D market grow in volume (+2%) with value tracking slightly behind, as consumers purse strings remained relatively tight and focused on getting the best value for money.
- The largest sector, telecom, continued to contract (-2%), but this was an improvement from last quarter (-8%) as demand for smartphones began to turn. Similarly, consumer electronics improved to be flat, rebounding from (-1%) last quarter as TVs and headphones drive growth.
- Photo remained the standout (+10%), despite the pace of growth halving compared to last quarter (+27%), led by cameras uplift easing to single digits and a significant drop for interchangeable lenses (+56% to +17%).
- Small appliances also outperformed (+7%), led broadly by household and seasonal categories.

Channel Dynamics

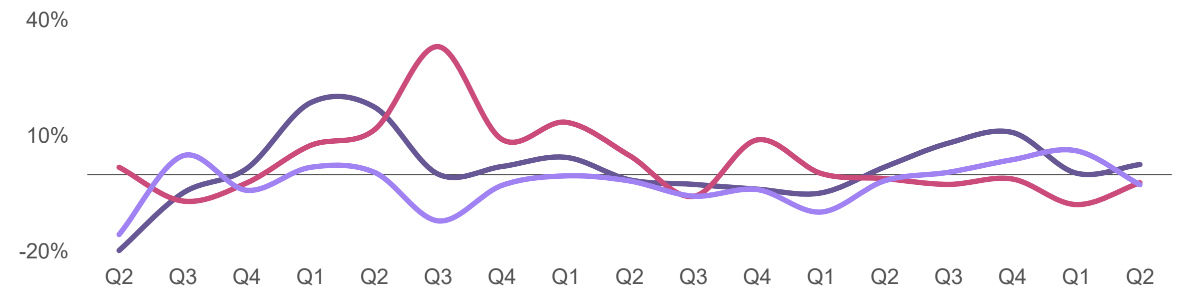
- Total retail spend grew by +4% in April and +3% in May, despite a sharp drop in consumer confidence to start the quarter (95.9 to 90.1), largely attributed to the US tariff policy announcements. Household retail, which encompasses most T&D categories, fell in line with this result for April, but performed behind in May, with spend allocated to cafes, restaurants, and takeaway food services.

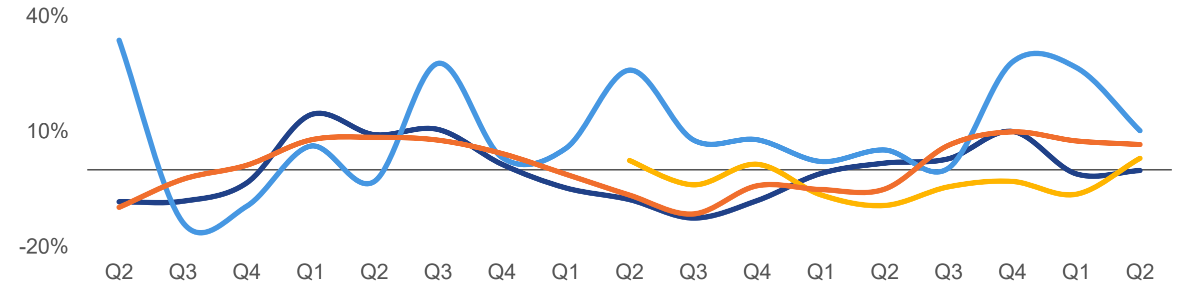
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office; online is tracked for SMP only - for further information please contact your local key account manager

Helicopter View Australia

Australia
Contact person:
Brendan Dowd
(MI Lead)
Brendan.Dowd

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

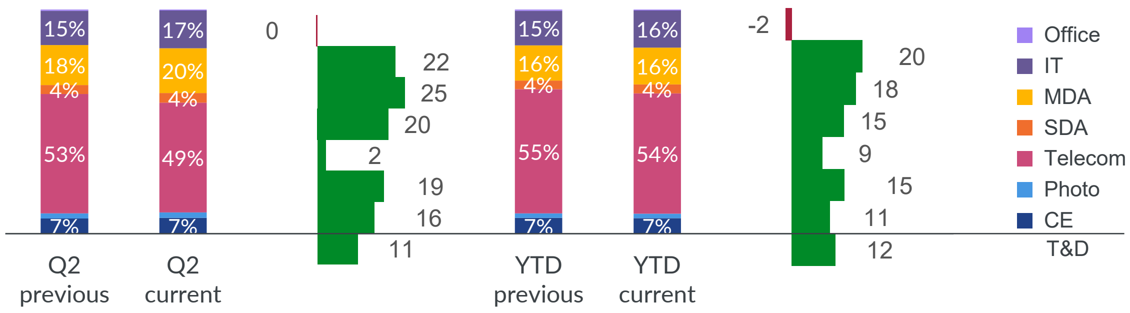
- IT's uplift is attributable to strong volume growth in media tablets (+24%), which helped to offset double-digit declines from monitors and visual cameras.
- Smartphones finished the quarter just shy of parity to last year, a significant improvement considering the struggle to start the year. Wearables however drifted backward (-8%) from a flat result in Q1.
- No change for CE QoQ. A resilient headphones market, fueled by wireless headbands and emerging bone conduction types, balanced out the decline from smart speakers. TVs also remained stable with growth of larger displays.
- The long-term driver of growth in photo were mirrorless cameras. However, the double-digit growth observed in the previous two quarters leveled off to parity YoY. Yet strong growth for fixed lens types continued.
- It has been a soft patch for MDA, suffering 5 quarters of consecutive decline. However, this quarter we saw a bounce-back for washing machines across types, but particularly washer dryers.
- Small appliances' consistent growth was led by its largest category, vacuum cleaners (+9%), as well as fryers (+15%). Further, a particularly cold start to winter significantly drove up early season sales of electrical heaters (+44%).

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office; online is tracked for SMP only - for further information please contact your local key account manager

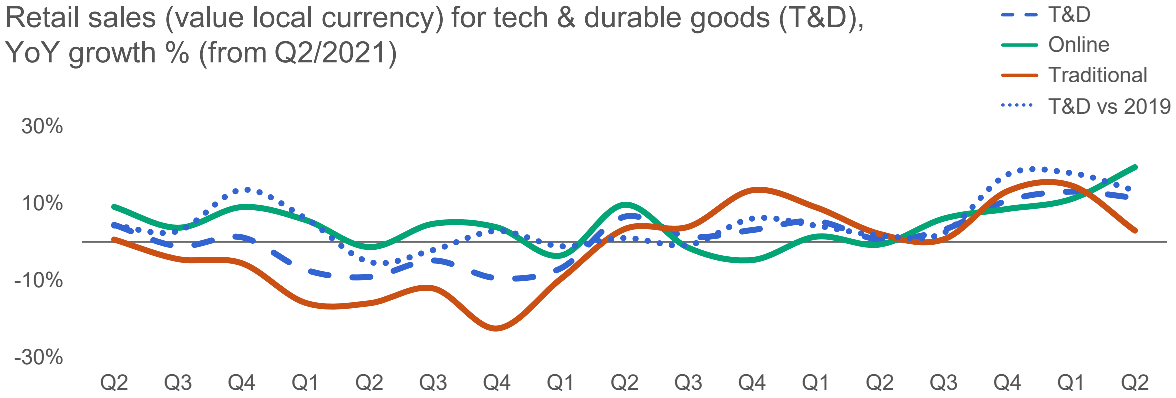
Helicopter View China

China
Contact person: **Benedict Hong** (CSM Lead)
Benedict.Hong

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- Political stimulation and promotion for many T&D product groups remained strong in Q2, leading to a plus of +12%, which was impacted by the slightly weaker performance of telecom.
- MDA maintained a high growth rate. The average price showed an upward trend, indicating a consumption upgrade. Kitchen appliances showed significant growth, reaching double digits for hoods, built-in hobs, and dishwashers.
- The TV market recorded a 15% YoY value expansion in Q2, primarily propelled by models with displays ≥80”.
- In addition to subsidy and promotions, new computer game launches helped the PC market to grow. Gaming laptops grew more than 40% YoY, significantly propelled by products equipped with RTX 50 series graphic cards. Apple continued being the top driving force of ultrathin laptops in Q2. Huawei launched its harmony PC in May, drawing great market attention.
- The photo market recorded double-digit growth in Q2 YoY.

Channel Dynamics

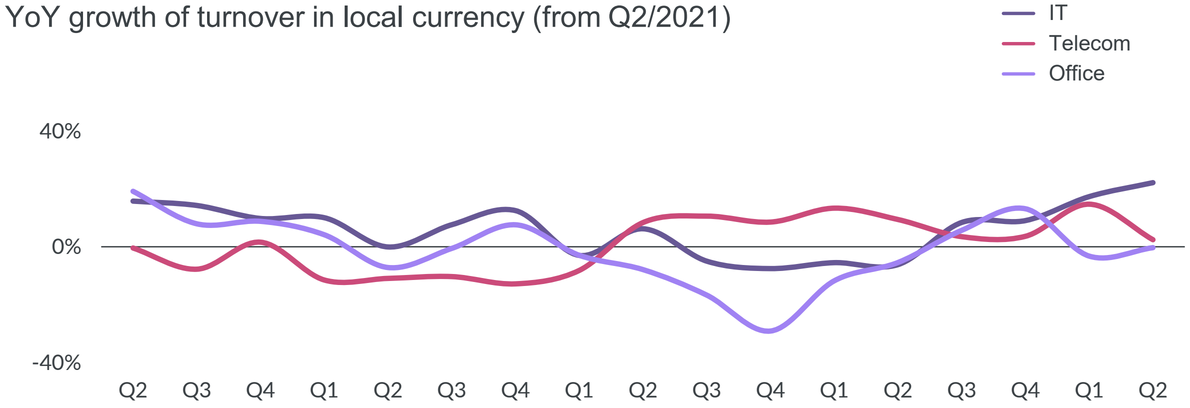
- The offline market growth rate started to slowdown due to partial suspension of subsidy. The online market rose by 19%, boosted by the 618 event. Overall, the entire market grew by 11.5%.

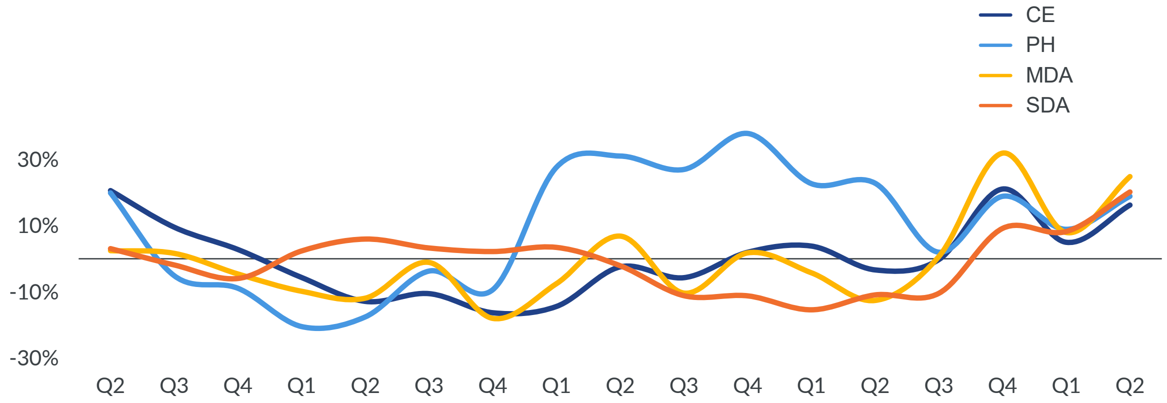
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View China

China
Contact person: **Benedict Hong** (CSM Lead)
Benedict.Hong

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

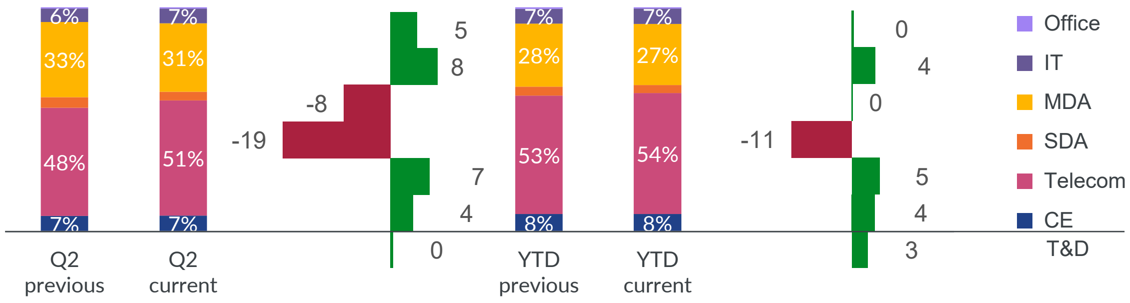
- PTVs with screen size ≥80”, mid-tier price band (CNY10-17K), and MiniLED TV segments showed significant growth, reaching +53%, +41%, and +171% respectively.
- The headset market reached 83 million in units (-3%) and 2.9 billion USD (+5.6%) in value. The average price remained at $35. National subsidies drove the performance of high-end models (+11%), especially those priced above $30.
- The phase-out of subsidies started to slow down smartphone market growth in Q2. With some positive impact from the 618 event, the overall trend managed to stay positive. Expansion in segment under 6K was a major trend in HY1.
- Air conditioners got additional benefits from national subsidies (for up to 3 devices per person) and rising average prices. Sales units increased 27% in HY1, with 34% in Q2 impacted by high temperatures.
- Vacuum cleaners continued to post strong growth (close to 40%), mainly driven by online sales of robotic vacuum cleaners. Furthermore, continuous technological innovations such as dual mop extension, flexi sweeping arm, edge-cleaning/zero-watermark residue technology in the wet &dry category also boosted this segment.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

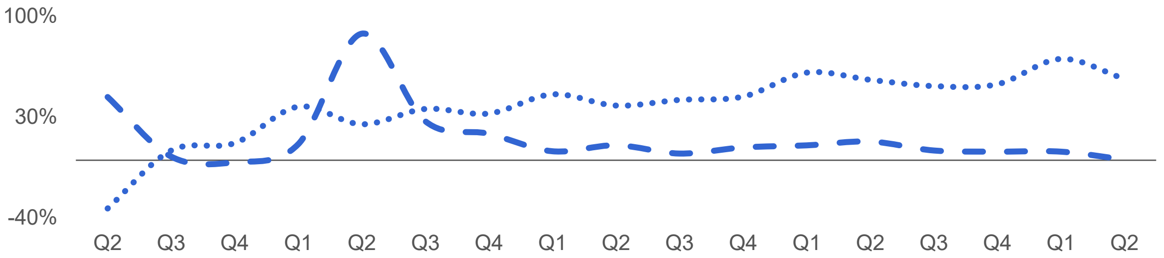
Helicopter View India

India
Contact person: **Aishwarya Raj** (CSM)
Aishwarya.Raj

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- India became the 4th largest economy surpassing Japan and in addition, has the highest GDP growth projections for 2025 at 6.6%.
  The impact of favorable macroeconomic factors such as lower inflation and tax cuts is expected to be more visible in HY2 and in 2026.
- The Tech & Durables industry witnessed a slowdown in Q2 YoY with a decline of 3% in volume while witnessing stable value growth.
- Albeit IT grew by 7% and 8% in volume and value, respectively, CE, MDA, and SDA witnessed tremendous decline in Q2 YoY.

Channel Dynamics

- With the increasing penetration of smartphones across India, the online retail channel is evolving rapidly. While major sales events such as the Big Billion Days and the Great Indian Festival have traditionally driven sharp spikes in online sales, many categories now witnessed year-round momentum. In fact, for several segments, online sales are now matching or even surpassing offline performance, reflecting a significant shift in consumer behavior and channel dynamics

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE, Small/Major Domestic Appliances, Telecom, IT, Office; online in India is left out as measured differently than POS panel methodology - for more information please contact your local key account manager

World

Western Europe

Eastern Europe

Middle East, Turkey & Africa

APAC

Australia

China

India

Japan

South Korea

Latin America

PREV NEXT

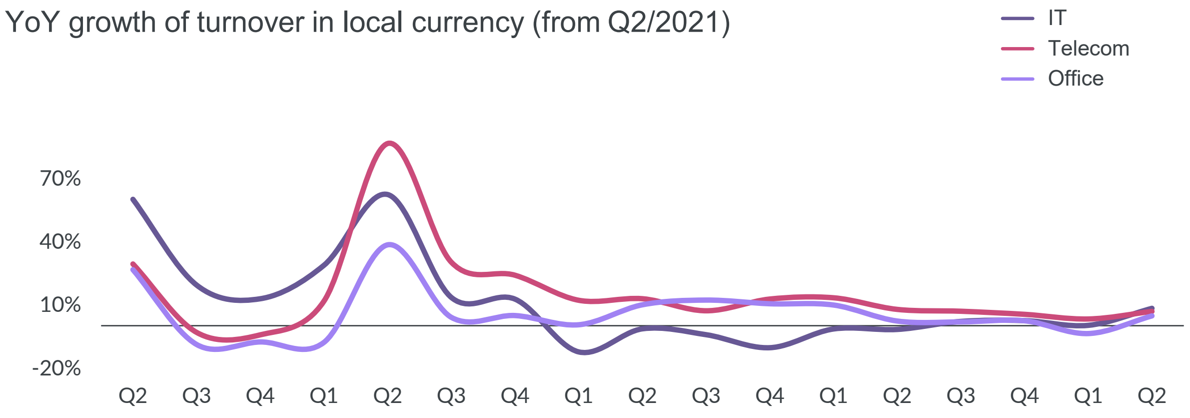
Helicopter View India

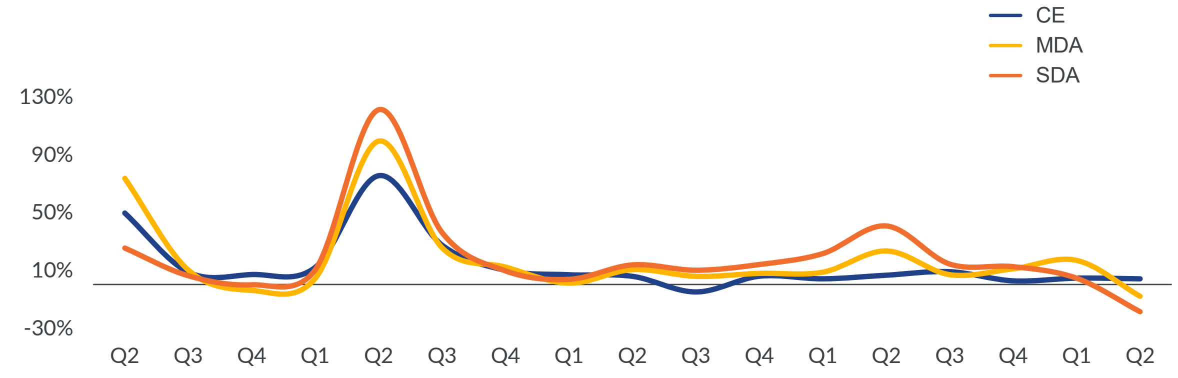
India

Contact person: **Aishwarya Raj** (CSM)

Aishwarya.Raj

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- While summer 2024 was one of the hottest in India, unusual weather patterns in summer 2025 led to decline in categories like air conditioner (-12% in value), air coolers (-33%), and refrigerators (-7%).
- Within SDA, brands like Havells and Crompton became the flag bearers of growth due to their increasing quality distribution, selling outlets and CS.
- Aspirational categories continued to show strong growth in Q2 YoY, with dishwashers leading at a 50% increase in value, followed by garment steamers at 20%, air purifiers at 23%, and vacuum cleaners at 19%.
- Within CE, PTV grew by 4% in value while categories like headsets, headphones, and audio home systems witnessed double-digit decline.
- Telecom grew by 1% in volume and 7% in value owing to several premium new launches by leading SMP brands. Core wearables declined by -23% in value and -18% in volume.
- Consumers were increasingly opting for energy-efficient, connected, and eco-friendly appliances, with a strong preference for premium features and after-sales service across product groups.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE, Small/Major Domestic Appliances, Telecom, IT, Office; online in India is left out as measured differently than POS panel methodology - for more information please contact your local key account manager

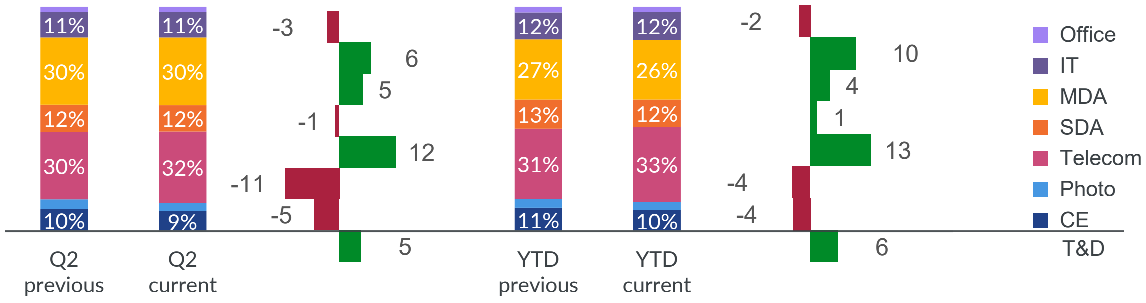
Helicopter View Japan

Japan

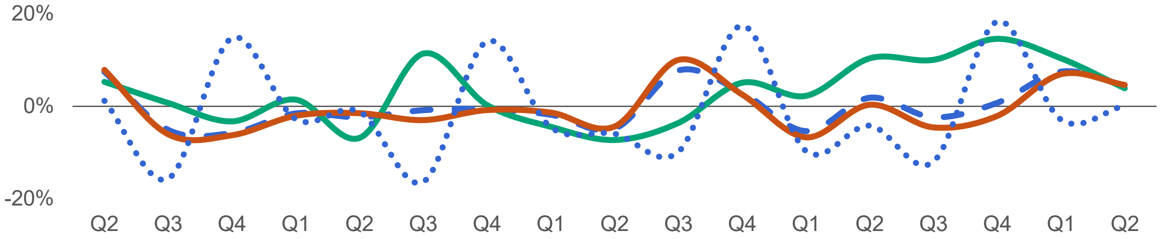
Contact person:
Saori Arai
(MI Lead)

Saori.Arai

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The Tech & Durables market recorded YoY growth in Q2. The telecom and IT markets performed well in particular, while the office, photo, and CE markets declined compared to the previous year.
- In June 2025, Japan's Consumer Price Index (CPI) rose by 3.3% YoY, with prices for household durable goods also increasing by 2.5% YoY. While gasoline and water prices were down YoY, food prices continued to rise.
- Based on the June 2025 Consumer Confidence Index trends, consumer sentiment appears to be improving. The rate of willingness to purchase durable goods, one of the key indicators of the Consumer Confidence Index, increased by 2.8% points MoM.

Channel Dynamics

- The traditional channel continued to show a positive trend YoY, following Q1. Segments such as mobile computers, phablets, and air treatment contributed to the growth of the offline channel.
- These same three categories were also driving growth in the online market.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Helicopter View Japan

Japan

Contact person:
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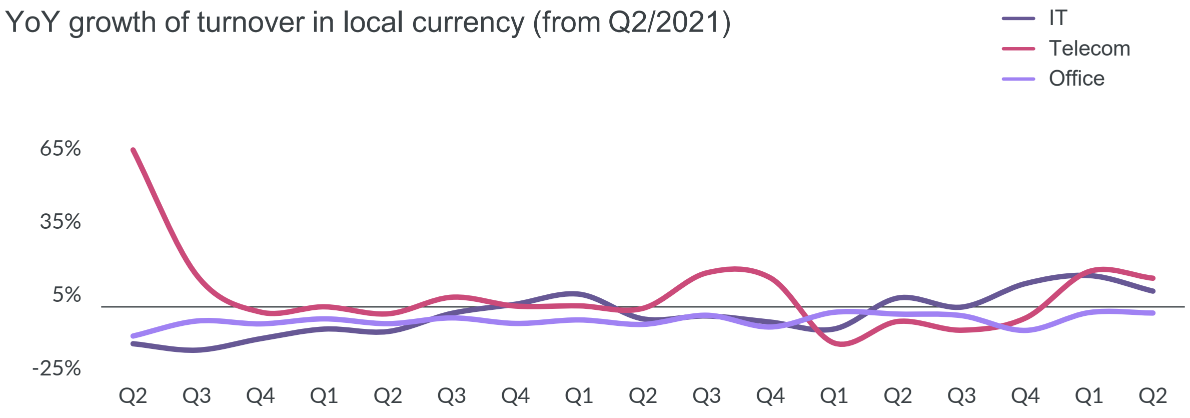
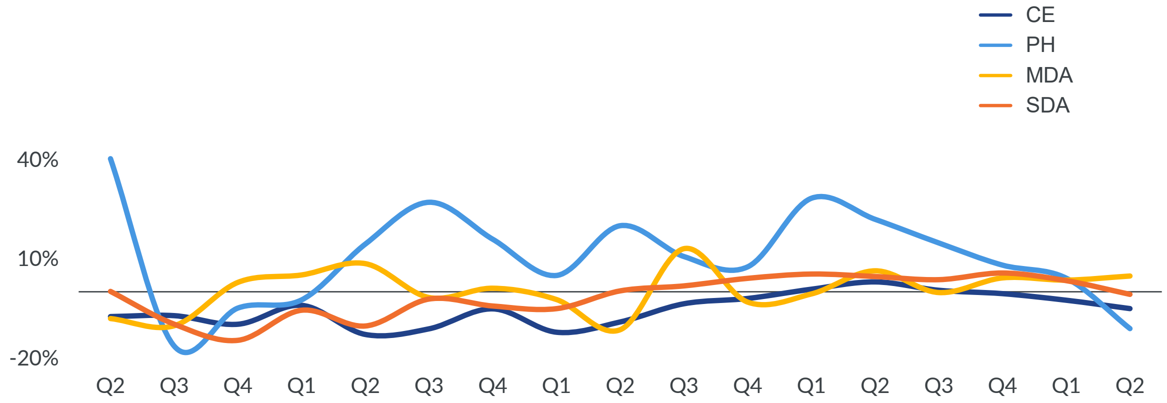
(MI Lead)

Saori.Arai

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

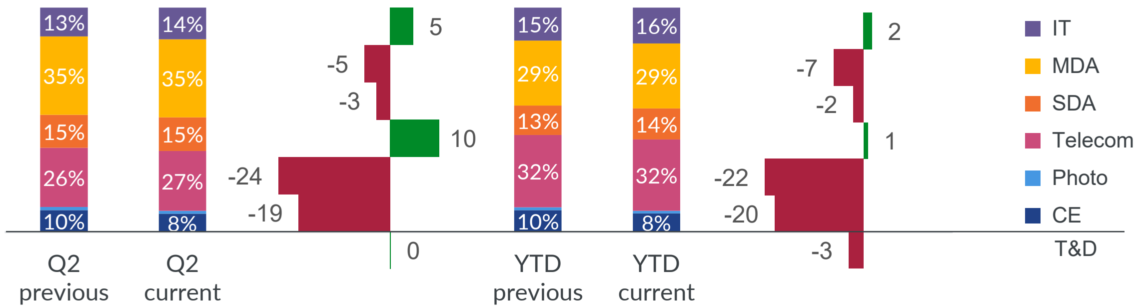
- IT sales increased due to demand for replacing PCs following the end of the support for Windows 10. The tablets market grew slightly.
- The telecom market continued to grow, driven by strong sales of new products. It also grew in comparison to the restrained purchases seen in Q2 2024 following the implementation of discount regulations.
- As in Q1, the OE market declined YoY due to weak demand for printers.
- The CE market showed a slight decline YoY. PTV sales decreased due to a drop in both sales units and average prices. The audio market performed well, supported by growing popularity of open-ear models.
- In the photo market, low-priced products performed well but high-priced products declined, resulting in an overall decline in Q2.
- The MDA market was driven by an earlier-than-usual surge in air conditioning sales due to high temperatures, resulting in YoY growth in both unit sales and value.
- In the SDA market, only the cooking appliances grew YoY, driven by strong sales of rice cookers and food preparation. In the beauty category, which had performed well previously, sales of hair dryers and shavers declined compared to the previous year.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

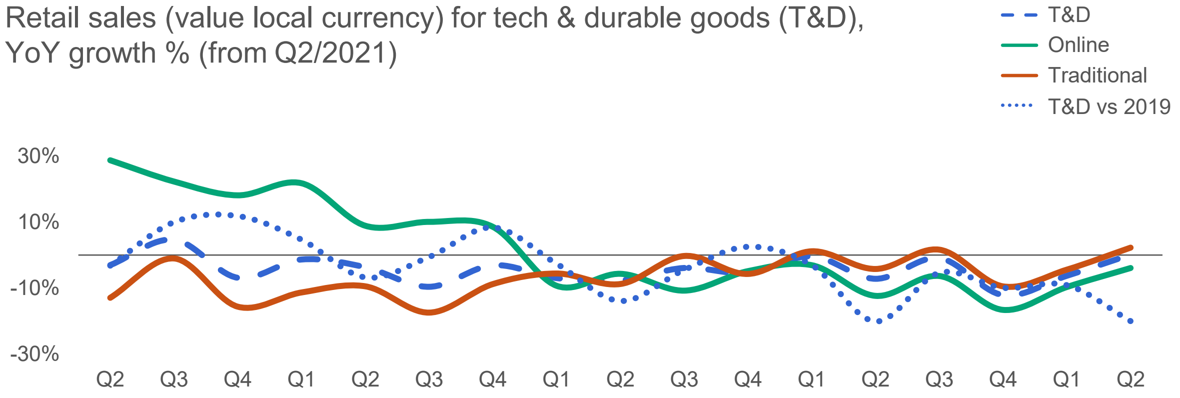
Helicopter View South Korea

South Korea
Contact person: **Wooyeol Kim** (CSM)
Wooyeol.Kim

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The IT sector experienced growth of +5% in Q2 YoY thanks to mobile computing. Given that the IT sector was flat in Q1, it can be said that the sector now is in a growth status beyond recovery after a long recession.
- The telecom market grew by about 10% YoY due to a 14% decrease in core wearables but balanced by a 12% increase in phablets.
- The photo and CE sectors continued to experience negative trends. All product categories within these sectors showed YoY declines, and there are currently no visible new growth drivers like innovative technologies which could stimulate consumer demand.

Channel Dynamics

- In Q2 2025, the home appliance market appeared to be recovering due to the base effect from the sharp downturn in Q4 2024. However, compared to pre-pandemic levels, growth remained relatively flat. While consumer sentiment was gradually improving, purchasing behavior remained cautious. Retailers were responding by strengthening consumer experience strategies, including AI-integrated smart home displays, subscription-based models, and lifestyle-focused store formats.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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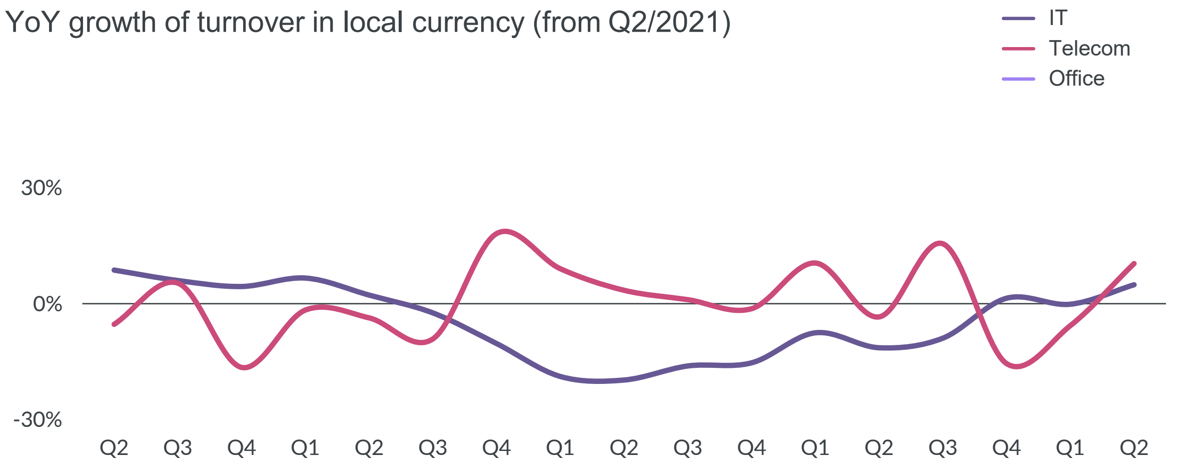
Helicopter View South Korea

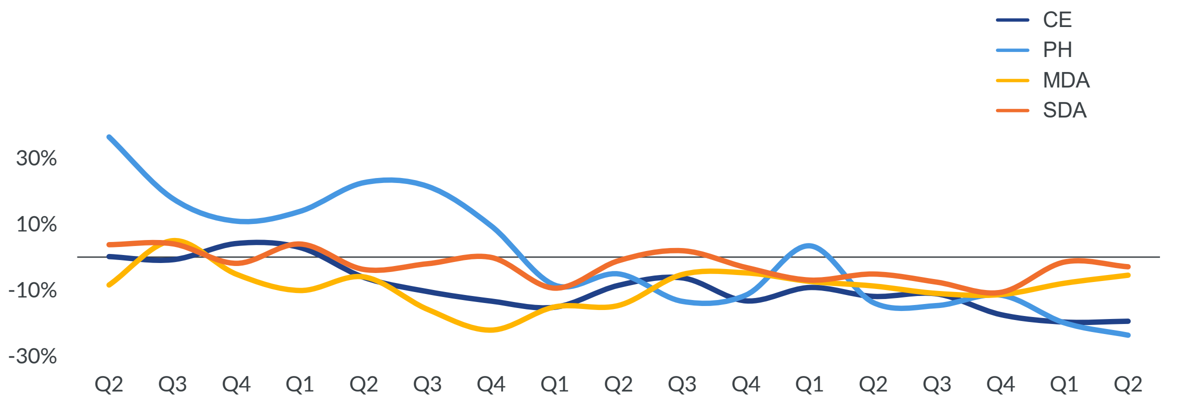
South Korea

Contact person:
Wooyeol Kim
(CSM)

Wooyeol.Kim

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- After twelve quarters of decline, the IT sector returned to growth, driven by the mobile PC market. Following consistent post-pandemic declines, the mobile PC market finally rebounded in Q2. Both gaming and non-gaming segments saw YoY growth.
  In gaming, revenue increased due to higher unit sales, supported by discounts on older models as laptops with Nvidia's 5000 series GPUs began entering the market.
- The CE and photo sectors continued to face prolonged decline due to market saturation and a lack of innovation, leading to longer replacement cycles. The downturn was especially severe in camera products, where smartphone substitution significantly accelerated the decline.
- In April, the telecom's SIM card hacking incident occurred, and as a result, a high number of USIM + smartphones were replaced and transferred to other competing carriers, leading to an increase in smartphones sales in Q2, growing by 12% YoY.
- The SDA market (excluding personal diagnostics and home climate products) saw a 3% decline in value, while unit sales increased by 6% YoY. Although robot vacuum cleaners showed growth in Q1 2025, they recorded an 12% YoY decline in value for this quarter. Driven by strong consumer demand, cordless liquidisers experienced a remarkable 139% YoY growth in sales value.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Chile and Peru exhibited a consistent growth trend across most sectors. The slowdown in inflation in Argentina contributed to sustained growth.

Latin America

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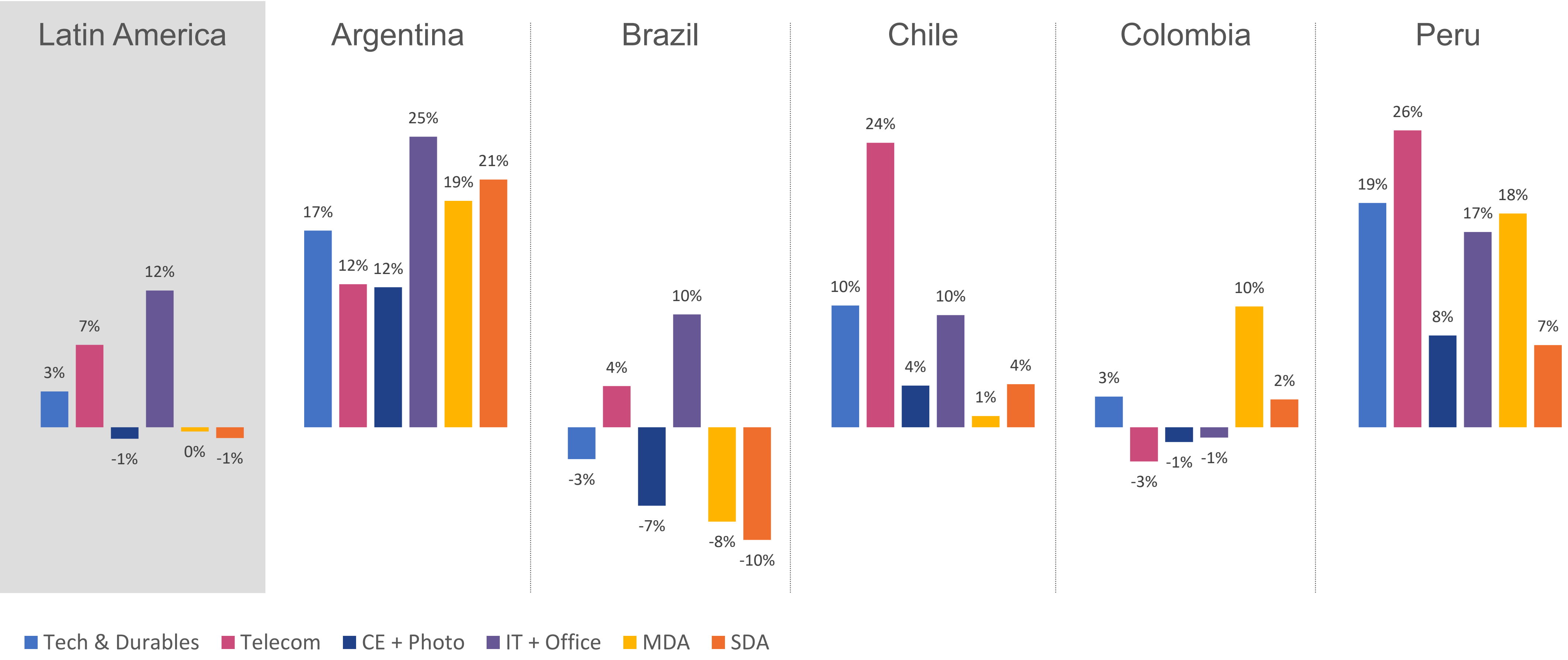
Rui Agapito
(CSM T&D Lead)

Rui.Agapito

USD growth % YoY Q2/2025



Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | Latam: AR BR CL CO CR EC GT HN PA PE

Helicopter View Latin America

Latin America
Contact person:
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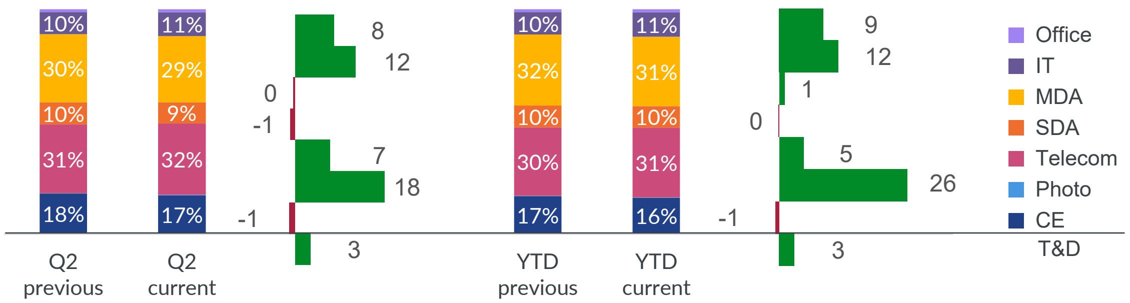
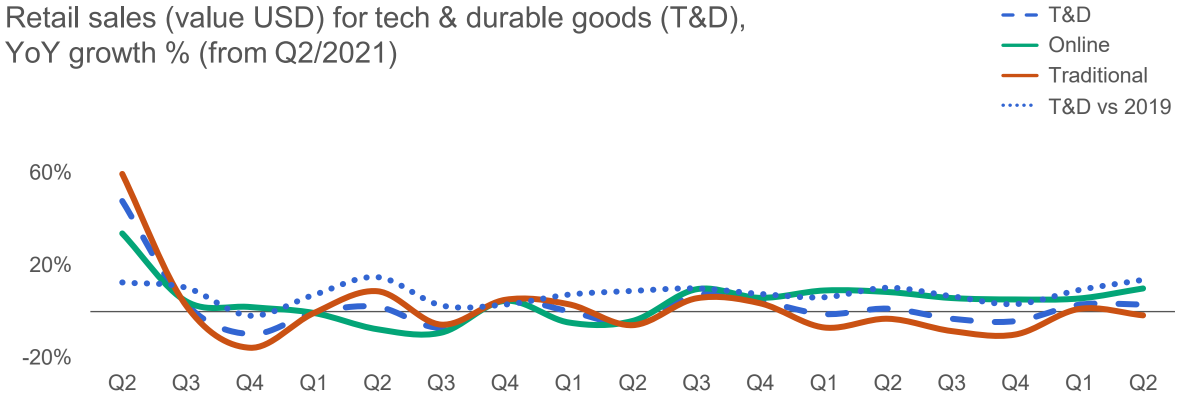
(CSM T&D Lead)
Rui.Agapito

Consumer basket and spending (value USD) for tech & durable goods (T&D), YoY growth %



Retail sales (value USD) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The positive trend for Latin America continued overall in terms of both demand and value.
- Argentina remained the country with the highest growth in all T&D sectors.
- Promotional events in the first half of the year contributed to this positive scenario.
- The IT sector continued to grow, following on from the growth seen in Q1.

Channel Dynamics

- The online channels performed better than Q1, mainly due to a number of promotional events focusing on online retailers.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | Latam: AR BR CL CO CR EC GT HN PA PE

Helicopter View Latin America

Latin America
Contact person:
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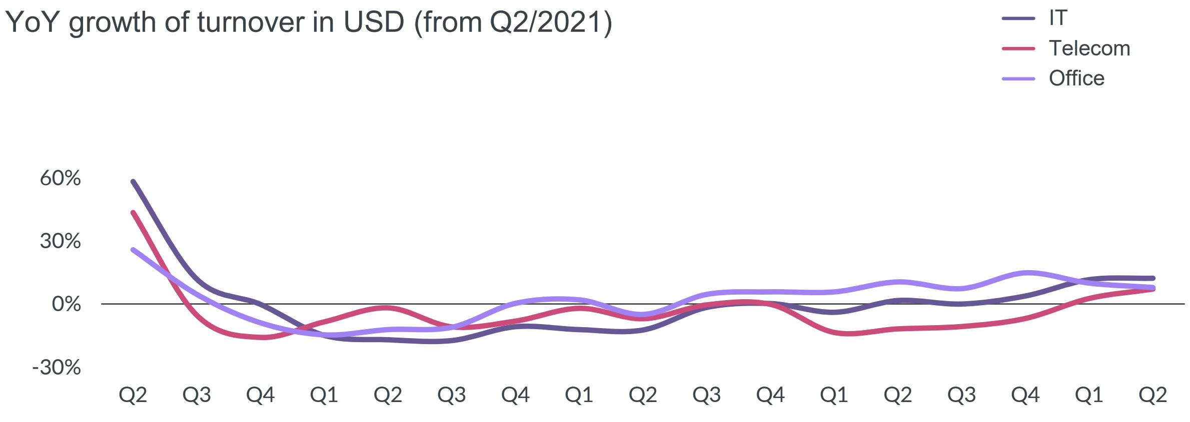
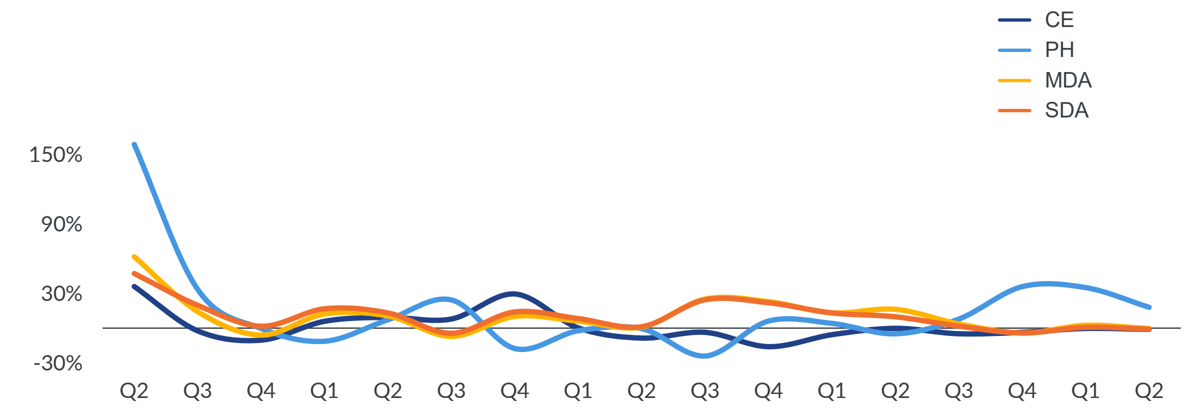
(CSM T&D Lead)
Rui.Agapito

YoY growth of turnover in USD (from Q2/2021)





Growing & declining product segments

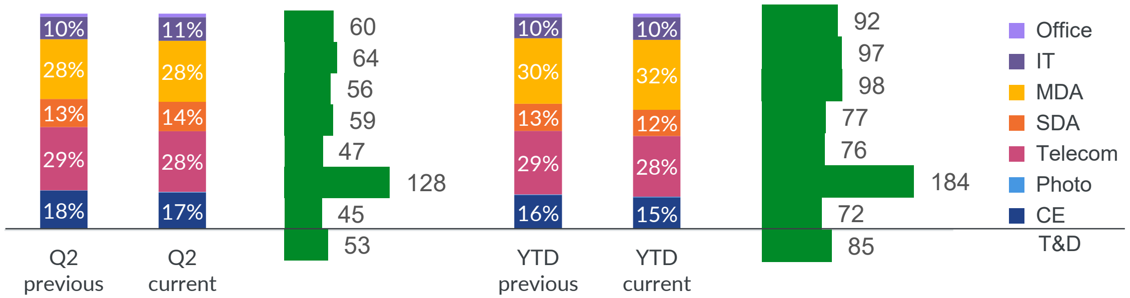
- The IT sector continued its positive trend in all countries, mainly thanks to media tablets.
- Telecom continued to deliver a strong performance across all countries. Growth was driven not only by SMP but also by core wearables.
- CE continued to decline due to weak performance in Brazil. In other countries, the CE sector remained stable, with the exception of Argentina, where it continued to increase significantly.
- Domestic appliances maintained their growth overall. Key product groups such as washing machines and refrigerators continued to drive growth, but complementary DA like dishwashers, hobs, etc. recorded the highest growth rates.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | Latam: AR BR CL CO CR EC GT HN PA PE

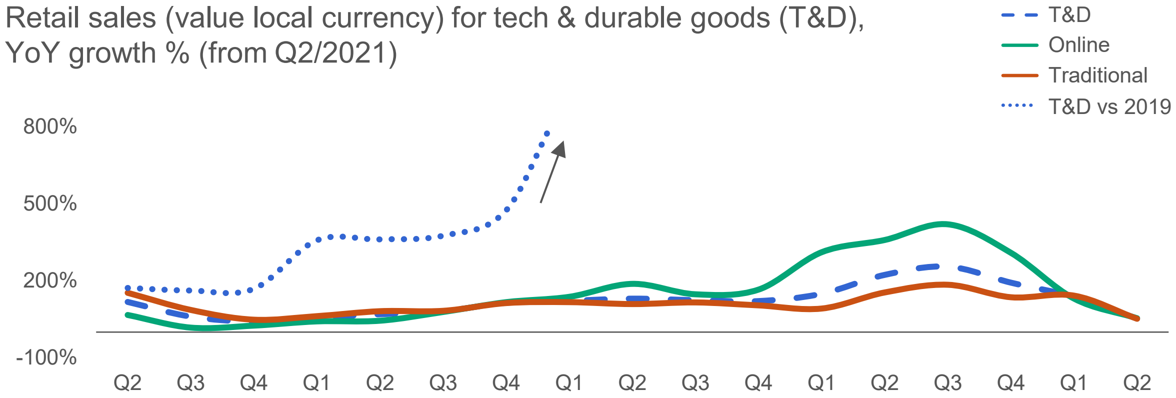
Helicopter View Argentina

Argentina
Contact person:
Brenda Marengo
(Sr Specialist CSM)
Brenda.Marengo

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- In Q2 2025, the market experienced a 53% increase in value compared to Q2 2024.
- In terms of units, the total market grew by 38% compared to the same period last year. Looking at the year-to-date performance, the growth was even more pronounced, with an 85% increase in YTD25 versus YTD24.
- Throughout the year, the photo, office, IT, and MDA sectors outperformed the market average and recorded the strongest growth. In contrast, the SDA, CE, and telecom sectors recorded rather moderate gains.
- It is worth noting that Argentina's inflation was 15.1% in HY1 2025.

Channel Dynamics

- On the one hand, the online channel continued its downward trend compared to previous quarters. On the other hand, the offline channel remained relatively stable throughout the quarter.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Helicopter View Argentina

Argentina
Contact person:
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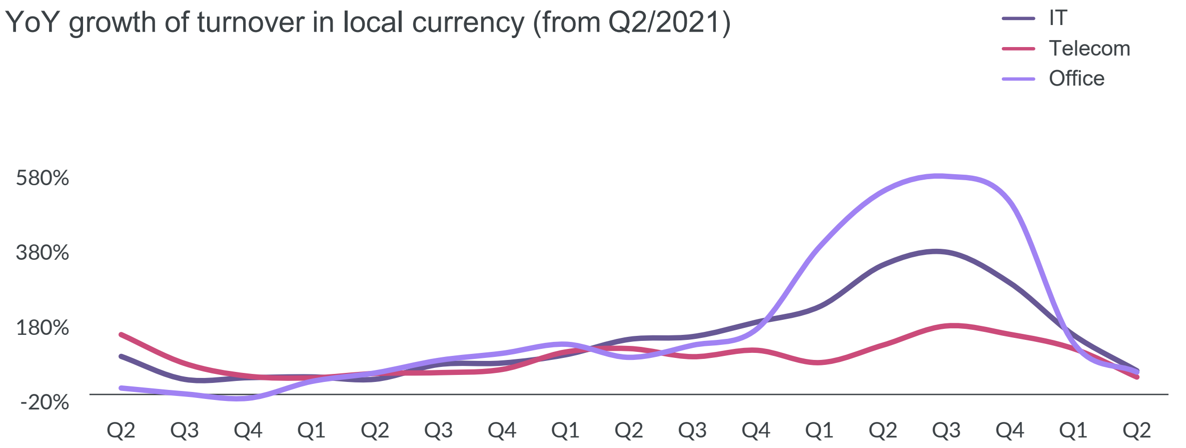
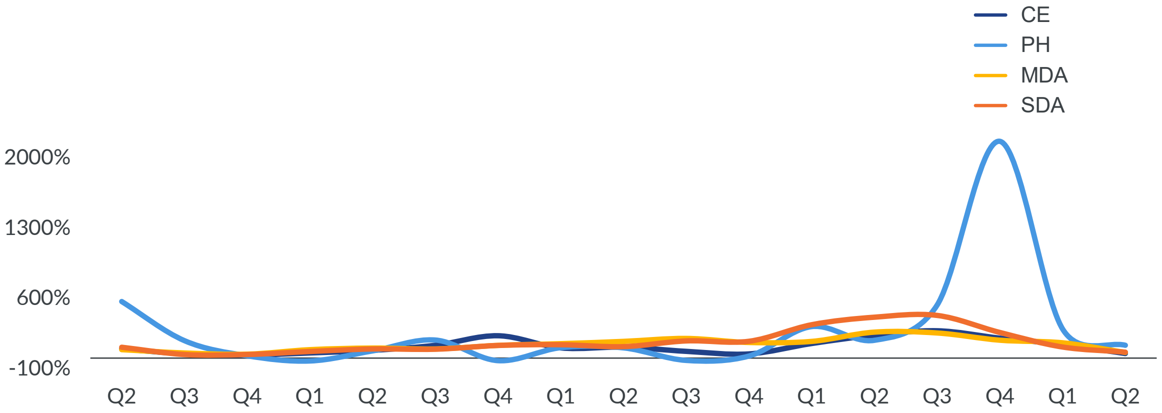
Brenda.Marengo

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- In Q2, the majority of sectors recorded significantly weaker growth compared to previous quarters, with IT, telecom, and office being the most affected.
- In YTD 2025, sales value was concentrated in smartphones (17%) and nine other categories (38%). The remaining 45% was split across the long tail of smaller categories.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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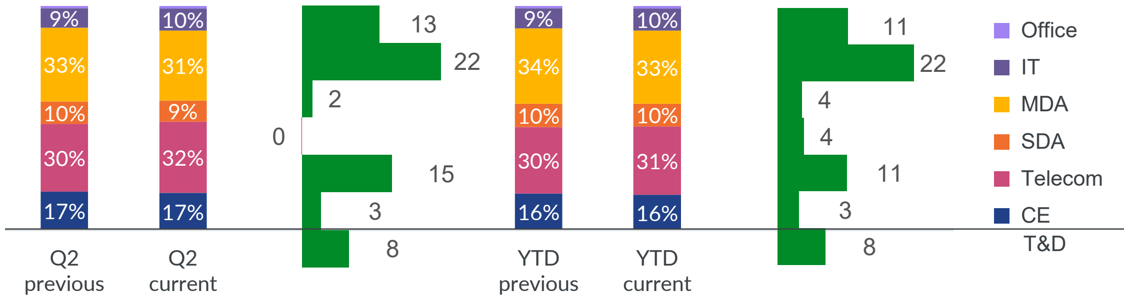
Helicopter View Brazil

Brazil

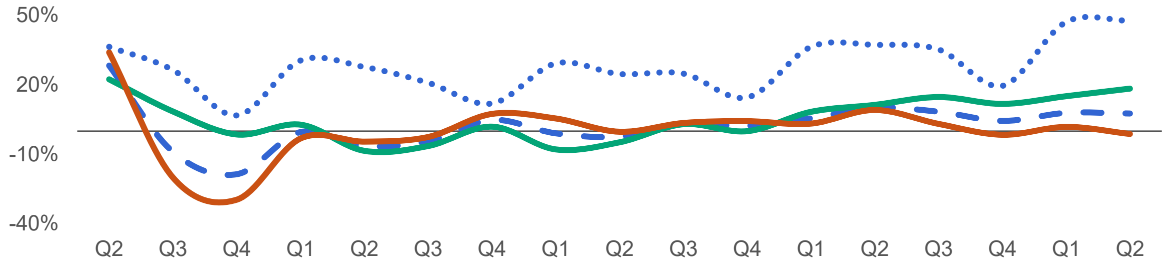
Contact person:
Mateus Rabelo
(CSM T&D)

Mateus.Rabelo

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- 8% YTD growth for T&D in Brazil was strongly linked to the IT and telecom sectors.
- The telecom sector expansion was propelled by smartphones, core wearables, and headsets.
- The IT expansion was driven by double-digit growth of media tablets and monitors.
- The SDA scenario flattened out, indicating fading in seasonality for electric fans.
- Four major categories accounted for MDA's growth: cooling, cooking, washing machines, and microwave ovens. This is a significant trend as MDA had a strong year in 2024.
- TVs account for 1% increment in 2025 so far. On the other hand, audio categories throve with increases surpassing 20%.

Channel Dynamics

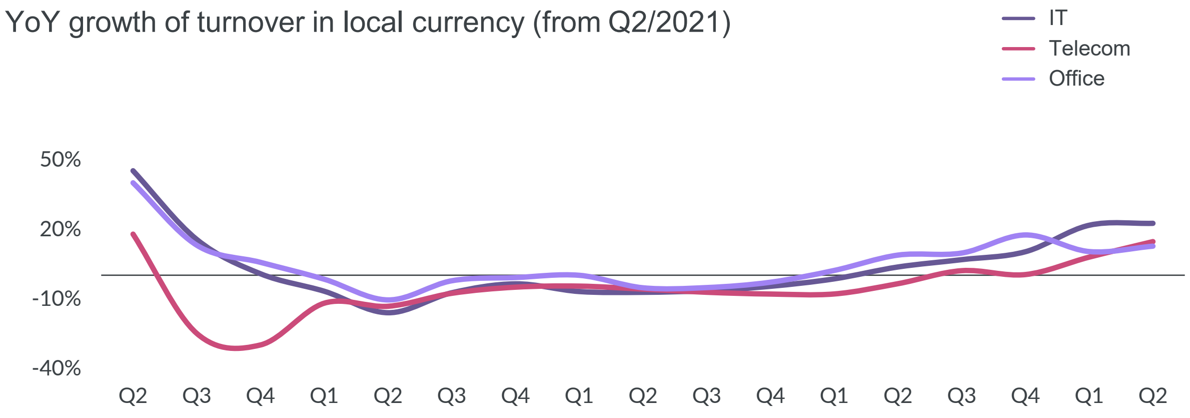
- 3P sales expansion within Brazilian T&D was consistent and originated from IT and telecom, now growing influence also in MDA and CE.

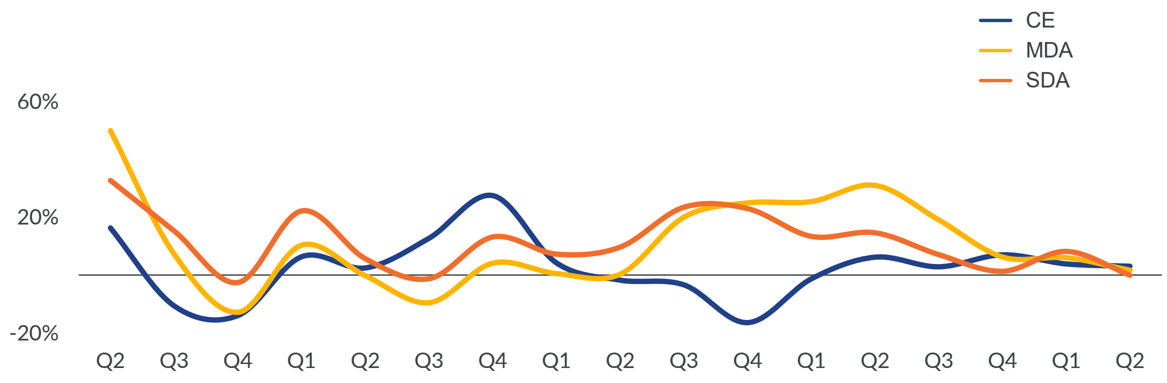
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Brazil

Brazil
Contact person: **Mateus Rabelo** (CSM T&D)
Mateus.Rabelo

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- Within IT, gaming monitors grew even stronger than the category average, showing a strong online effect. Marketplaces were a driving force for both total sector and categories.
- In addition to core wearables' expansion in telecom, headphones and headsets were in high demand as well.
- Demand for electric fans flattened as temperatures dropped. Vacuum cleaners' expansion was close to +24%, growing for the third year in a row.
- Cooling continued to grow in the market at a rate of +5%, which is remarkable considering >15% expansion in 2024 vs 2023.
- Within audio, Mini Bluetooth speakers' expansion was on track, following a 10% market growth in 2024 vs 2023. A key segment to watch are party speakers.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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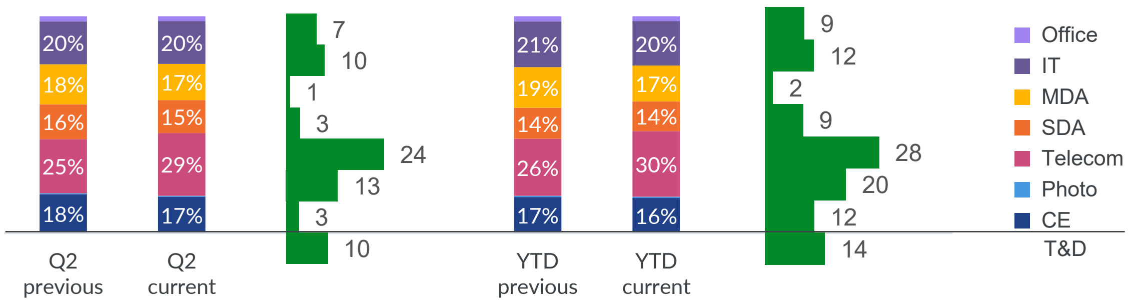
Helicopter View Chile

Chile

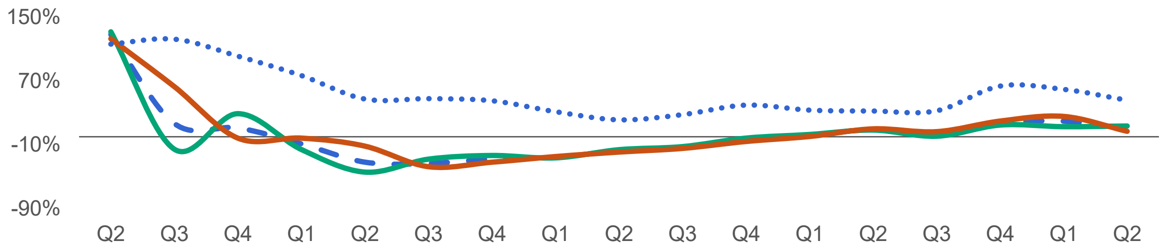
Contact person:
Juan Carlos Montes
(MI Lead)

JuanCarlos.Montes

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- During the second quarter of 2025, the technology and durables goods market demonstrated solid performance, largely driven by the eCommerce event held in June (Cyber Day). Although growth was lower than in the first quarter, Q2 made a significant contribution to maintaining market momentum, resulting in a positive year-to-date outcome.
- The first quarter served as the main driver of annual growth, with an increase of +18.5%. However, the second quarter (+10%) also played a key role in sustaining market activity.

Channel Dynamics

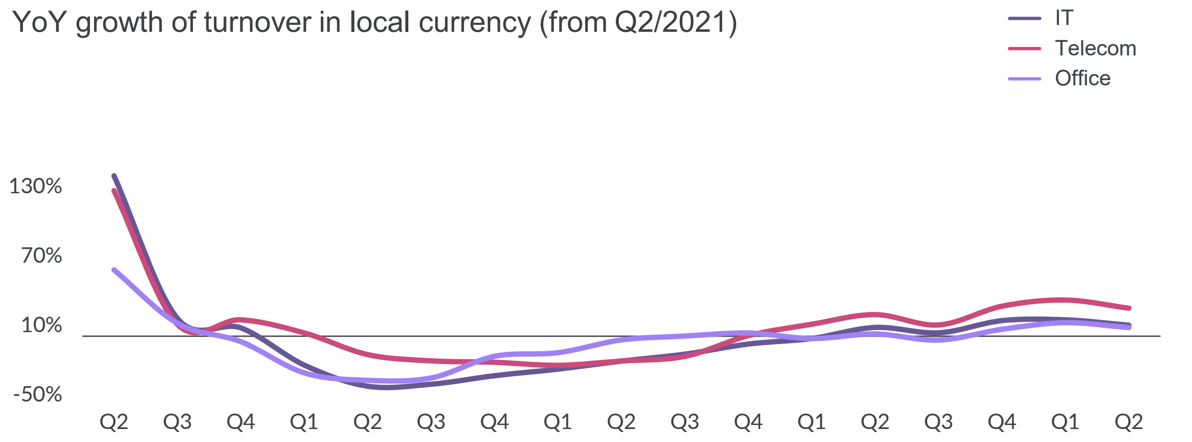
- Digital channels continued to gain momentum in Q2 2025, with marketplaces standing out as the fastest-growing format, reaching +32% growth. This strong performance highlights the increasing relevance of online platforms, particularly during promotional events like Cyber Days.
- Physical stores also showed a positive trend in the second quarter of 2025, reaching +7%. While this performance was lower compared to digital channels, it reflects a sustained recovery of the traditional retail format.

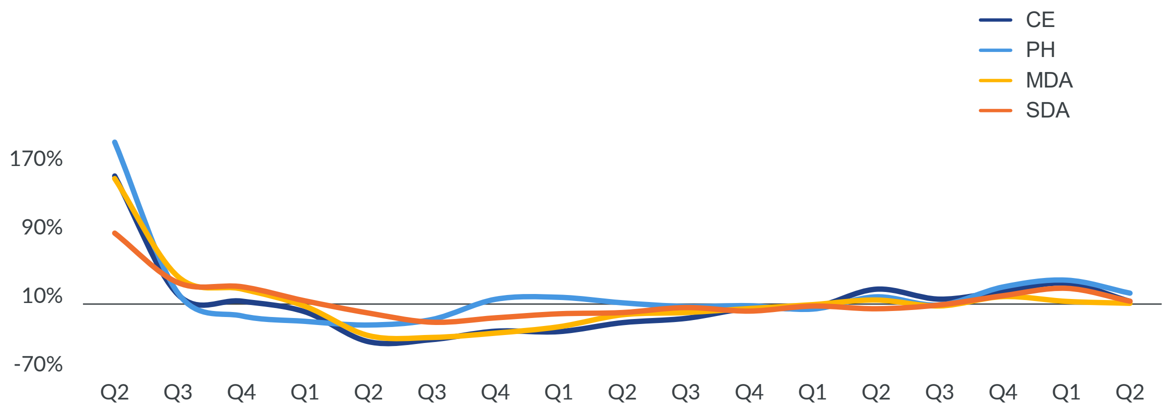
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Chile

Chile
Contact person:
Juan Carlos Montes
(MI Lead)
JuanCarlos.Montes

YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

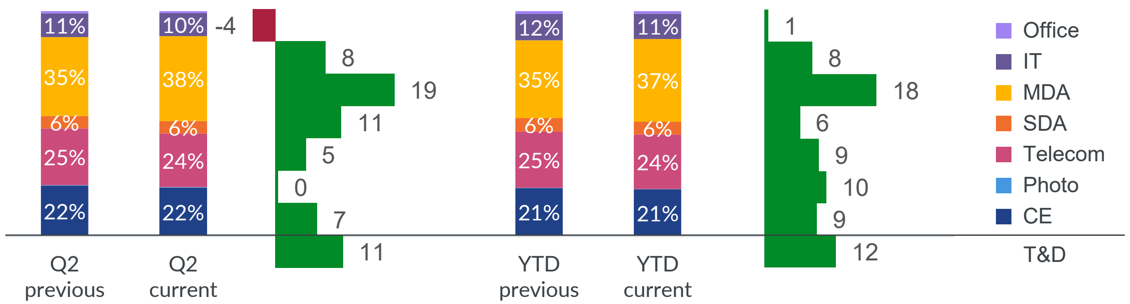
- IT maintained a solid and sustained performance during the first half of 2025. This result was primarily driven by the strong performance of gaming-related subcategories, such as video game consoles and gaming and leisure devices, as well as continued demand for media tablets and monitors.
- Telecom led market growth in Q2 with an increase of +28.5%, consolidating its position as the most dynamic category of the quarter. The Cyber Day event played a key role by driving strong sales of phablets and wearables.
- CE delivered an excellent performance in Q1 2025. However, it experienced a significant slowdown in the second quarter. This decline was mainly driven by the underperformance of PTV, which failed to capitalize on the momentum of the Cyber Day event.
- MDA posted marginal growth of +1% in Q2, reflecting a significant slowdown compared to the strong performance seen in Q1. The most pronounced decline was observed in the tumble dryers' category, which had shown strong momentum the previous year, particularly during the Cyber Day event.
- SDA established itself as one of the most dynamic categories, driven by remarkable growth in Q1 and solid performance in Q2. This strong result was primarily led by the personal care and coffee maker segments, which stood out with particularly strong performances.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

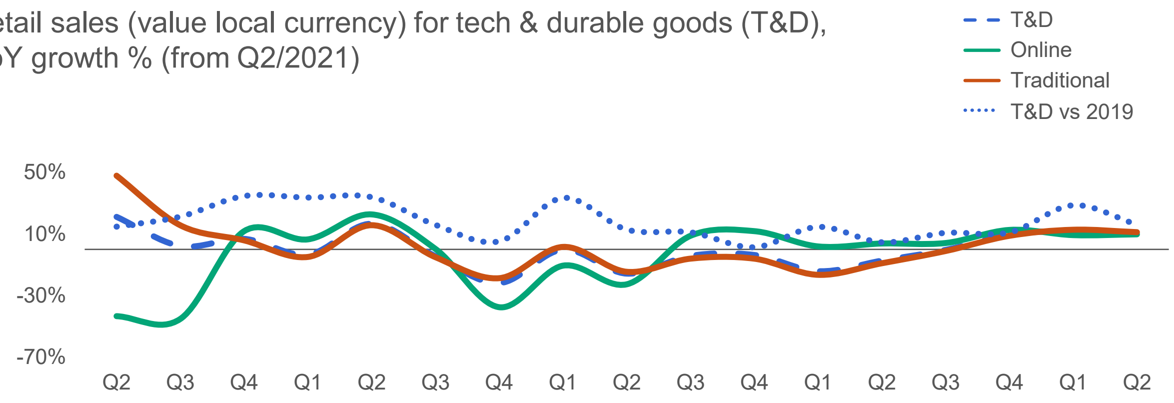
Helicopter View Colombia

Colombia
Contact person: **Adriana Tellez** (MI Lead)
Adriana.Tellez

Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- The Colombian market expanded by +6% vs Q1 2025 and +7% YoY. Growth was primarily driven by strong performance of major domestic appliances (MDA) and consumer electronics (CE), while IT and small domestic appliances (SDA) showed mixed dynamics.

Channel Dynamics

- CE stores led growth with a solid plus of 12% vs Q1 and +10.5% YoY, driven by strong promotional activity. MDA followed at +4% QoQ and a remarkable +23% YoY, reflecting robust replacement demand. IT declined by 22% QoQ and by 9% YoY, indicating a sharp correction after a strong Q1.
- Mass merchandisers/DIYs posted stable growth of +5% QoQ and YoY, maintaining consistent performance. MDA grew +5% QoQ and +17% YoY, confirming strong demand across retail formats. IT contracted -19% QoQ but still achieved growth of +7% YoY, suggesting a rebound from a soft 2024.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Helicopter View Colombia

Colombia
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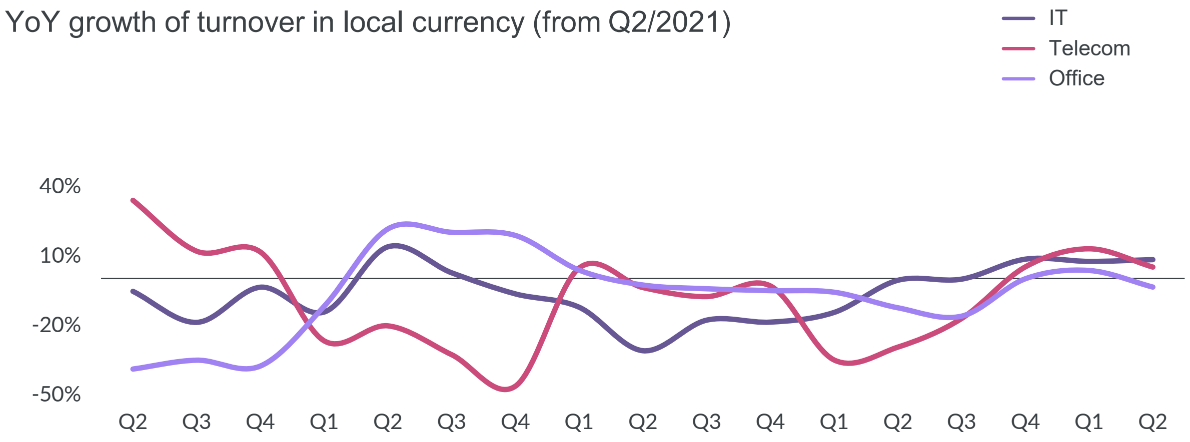
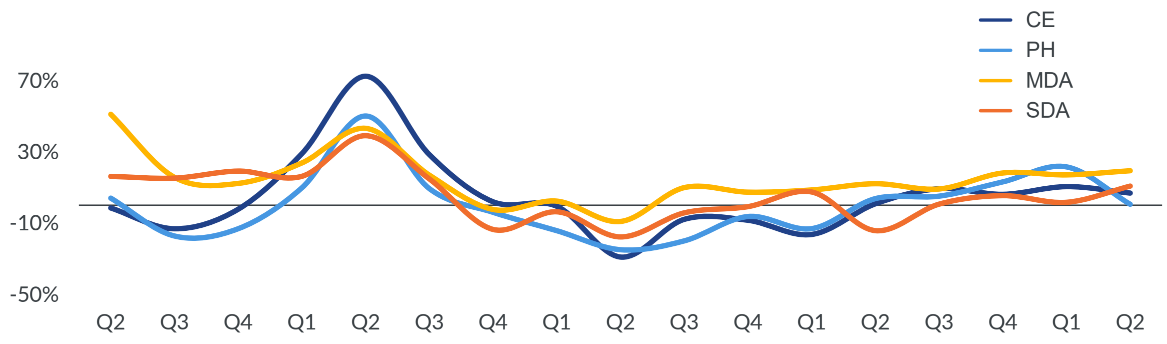
YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- CE posted consistent growth across all regions, up +6% vs Q1 and +7% YoY. Central Colombia and Antioquia were key contributors, reflecting stable consumer demand and promotional activity.
- MDA led category growth at +5% vs Q1 and +19% YoY. The sector showed robust performance across all regions, particularly in Atlántico and Oriente, supported by replacement cycles and seasonal campaigns.
- SDA contracted -6% vs Q1, likely due to post-seasonal normalization, but maintained a +9.5% YoY increase. Online and Pacific regions showed relatively stable performances.
- IT declined by 15% vs Q1 2025, indicating a slowdown after a strong start to the year. However, it still recorded +12% YoY growth, suggesting a recovery from a weaker 2024 baseline.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Eastern Europe

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APAC

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Chile

Colombia

Peru

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Helicopter View Peru

Peru

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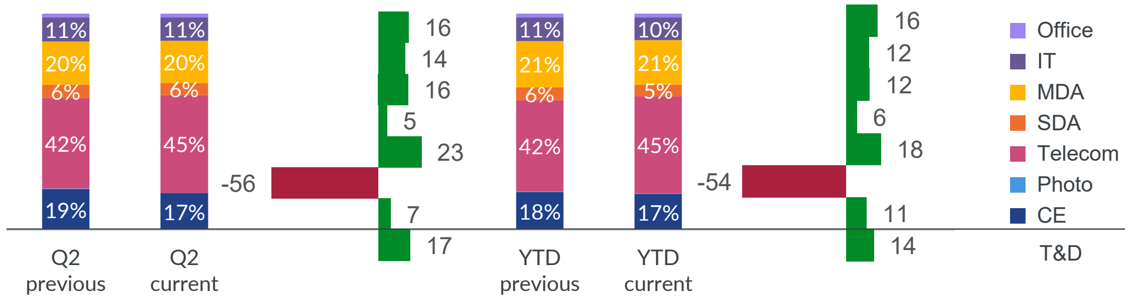
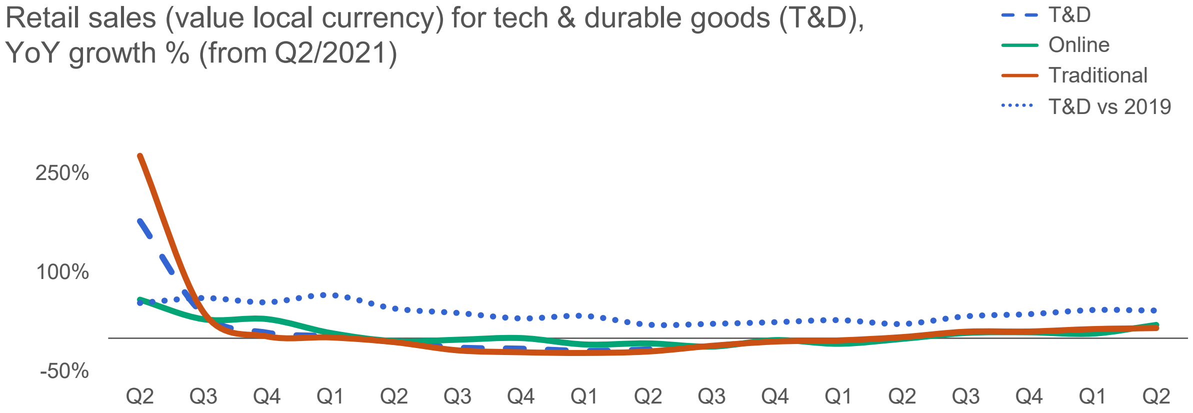
Consumer basket and spending (value local currency) for tech & durable goods (T&D), YoY growth %



Retail sales (value local currency) for tech & durable goods (T&D), YoY growth % (from Q2/2021)



Key Insights

- During the second quarter of 2025, the Peruvian market continued its sustained growth, following the upward trend observed over the past few quarters, and reached a growth rate of 13%. The telecom, office, and MDA sectors experienced most significant increases, with growth rates of 23% and 16%, respectively. In contrast, the photo sector remained the only one to decline, registering a 56% decrease.
- Furthermore, the market's growth trend aligns with the improvement of the country's macroeconomic indicators, including GDP growth and a reduction in inflation, reaching the target ranges set by the Central Reserve Bank of Peru (BCRP), between 1% and 3%.

Channel Dynamics

- All channels continued to grow, with department stores and specialist retailers showing the highest growth rates, at 16% and 11% respectively.
- Additionally, in-store sales continued to outperform the online channel YTD. However, during the second quarter of 2025, the online channel recorded a growth rate of 18%, contributing 7% to the market's overall growth during that period.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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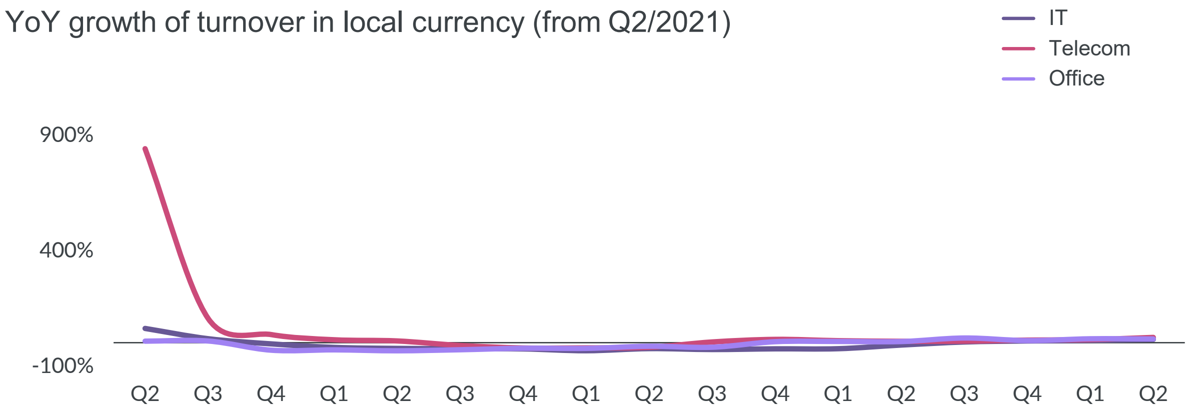
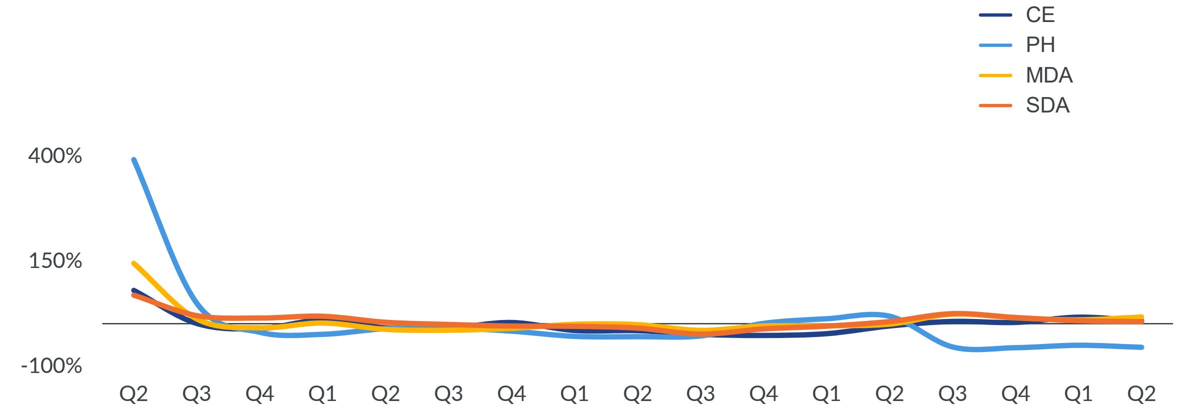
YoY growth of turnover in local currency (from Q2/2021)





Growing & declining product segments

- Telecom remained one of the best-performing sectors, recording a 23% growth in the second quarter of 2025. A key driver of this performance was the 25% increase in sales in department stores. The preference for premium models persisted, contributing to a 6% rise in the average price. Devices with 8GB and 4GB of RAM continued to perform strongly, currently accounting for approximately 65% of the total market.
- The IT sector continued to recover, reaching a growth rate of 14%, mainly driven by mobile computing, which grew 16% thanks to strong online channel performance (+22%) and the gaming segment (+20%). Printers maintained their steady upward trend, reaching 18% growth in Q2.
- In consumer electronics, PTV – accounting for over 80% of the sector – continued its growth trend with a 5% increase in Q2, supported by the ongoing demand for low-cost brands and trade brands. The online channel performed better, growing nearly 8%.
- MDA grew by 16% in Q2 2025 compared to the same period in 2024. Cooling remained the leading category, accounting for 36% of the sector. A 9% price reduction continued to be a key strategy, driving a 22% increase in units sold, highlighted by a strong 49% growth in side-by-side models.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q2/2025 vs Q2/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Stay tuned for the Q3 2025 edition coming in mid-November 2025

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