Get GTDC Ready with GfK NIQ's GTDC Summit North America Briefing

Unlock Key Distribution Market Insights
for Confident Conversations

Distribution & Supply Chain Team

Master indirect sales channels with new insights

Upgrade GfK Market Intelligence with GfK Distribution Intelligence

powered by GTDC GfK

GfK Market Intelligence

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

GfK Supply Chain Intelligence

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

GfK Distribution Intelligence

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

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

*Tech and Consumer durables based on country coverage and product groups

Largest global coverage of distribution partners*

Benefit from local & regional expertise in 45+ markets

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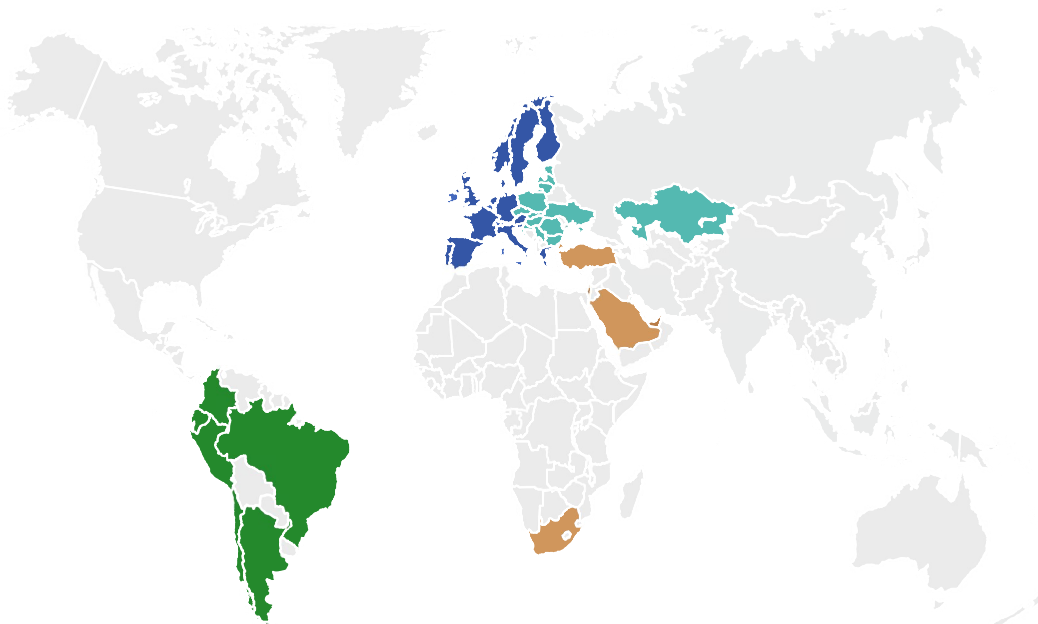

WEU

- Austria
- Belgium
- Cyprus
- Denmark
- Finland
- France
- Germany
- Great Britain
- Greece
- Ireland
- Italy
- Luxembourg
- Netherlands
- Norway
- Portugal
- Spain
- Sweden
- Switzerland

CEE / CIS

- Bulgaria
- Croatia
- Czech Rep.
- Estonia
- Hungary
- Kazakhstan
- Latvia
- Lithuania
- Poland
- Romania
- Serbia
- Slovakia
- Slovenia
- Ukraine

MEA

- Arab Emirates**
- Israel**
- Saudi Arabia**
- Turkey
- South Africa***

LATAM

- Argentina
- Brazil
- Chile***
- Colombia***
- Ecuador***
- Peru***

*Tech and Consumer durables based on country coverage and product groups; **in ramp up; ***limited PG's only; ****available until February 2020

GfK provides unrivalled insights to Distribution markets worldwide

Get strategic & tactical data quickly each Friday on single SKU item level

Global coverage

45+ countries across EMEA, APAC & LATAM

Product Scope

~200 product groups for IT, OE, TC & CE sector

Channel Insights

24 granular channels on B2B & B2C level

Fast Track

data available on weekly, monthly or quarterly basis

Hard facts

sales units, sales value & price in local currency

Benefit from the largest distribution network* tracking sell-through to fill the gap between manufacturers & POS by providing global sales data from 300 distribution partners

*Tech and Consumer durables based on country coverage and product groups

Global Technology & Distribution Market Trends

Subdued global economic growth overshadowed by divergence among major economies

Major themes continue to disrupt market growth and inject further uncertainty

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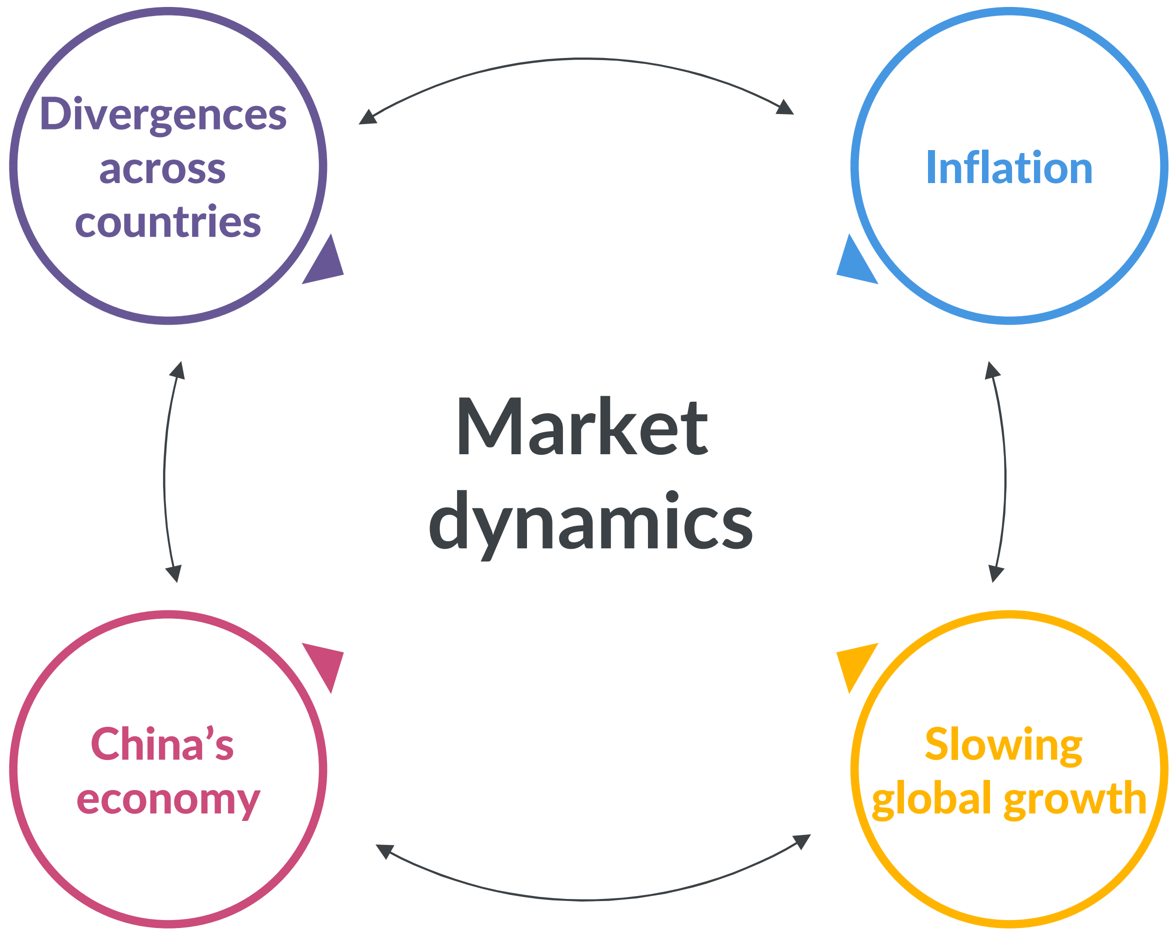
- Wars and geopolitical tensions as well as a rise in protectionist policies continue to amplify divergences across countries. This fragmentation negatively impacts international investment, global trade and supply chains

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



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

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

*https://www.reuters.com/world/china/chinas-economic-growth-surpasses-forecasts-stimulus-push-2025-01-17/

Subdued growth projections overshadowed by divergence among major economies

IMF in January 2025 continues to predict medium-term risks tilted to the downside

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Upsides

Stable growth outlook continues
Whilst there is increasing divergence amongst major economies, advanced economies are predicted to grow more in 2025 due to robust labor markets and accelerated investment – but the potential is being offset by trade policy uncertainty dampening investment in other areas

Inflation converging back to central bank targets
But slower in emerging market and developing economies, and low inflation persists in China

Underlying demand remains robust
In several economies, for example in the US due to strong wealth effects and a less restrictive monetary policy stance

Downsides/risks

Debt vulnerabilites
High levels of public and private debt in both advanced and emerging economies could become more problematic, especially if global interest rates remain elevated.

Continued inflationary pressures
Inflation could remain persistently high in certain emerging markets and developing countries. This could challenge monetary policy and economic growth

Geopolitical tensions
Ongoing geopolitical uncertainties in several regions could disrupt global trade, increase energy prices, and worsen economic conditions.

Trade and supply chain uncertainty
An intensification of protectionist policies, especially in the form of a new wave of tariffs, could negatively impact global trade, investments and supply chains

Source: IMF World Economic Outlook Jan 2025
Global T&D Trends Report Q4 2024 – Global Strategic Insights

Proposed US tariffs on imports from Jan2025 will have several knock-on effects, both for US and international businesses and consumers

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Impact of Tariffs – General factors

Inflationary effects

An increase in the effective tariff rate on international imports into the US causes the cost of those imported goods to rise. Companies may choose to pass on these increased costs to the consumer, by raising retail sell prices.

Industries heavily reliant on foreign inputs:
Automobiles, electronics, fashion apparel, raw materials for manufacturing such as chemicals, plastics,metals and minerals

Supply chain rewiring

In the immediate term, companies may stockpile goods. This is a rather short-term reaction. In the longer term, international companies could circumvent the tariffs by relocating their supply chains closer or to the US. US companies may in turn source new suppliers from non-tariffed countries.

Retaliation

Trade partners may impose counter-tariffs, making U.S. exports more expensive and disrupting supply chains further.

The world economy

Reduced US demand for foreign goods will likely cause the USD to appreciate. An (even) stronger U.S. dollar can have negative effects on the global economy. It often slows global trade growth, limits developing nations' access to international capital markets, and makes it harder for countries with weakening currencies to manage inflation.

Source: Bloomberg, January 2025; Chatham House The Royal Institute of International Affairs, 2025
Global T&D Trends Report Q4 2024 – Global Strategic Insights

Burdened business confidence

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

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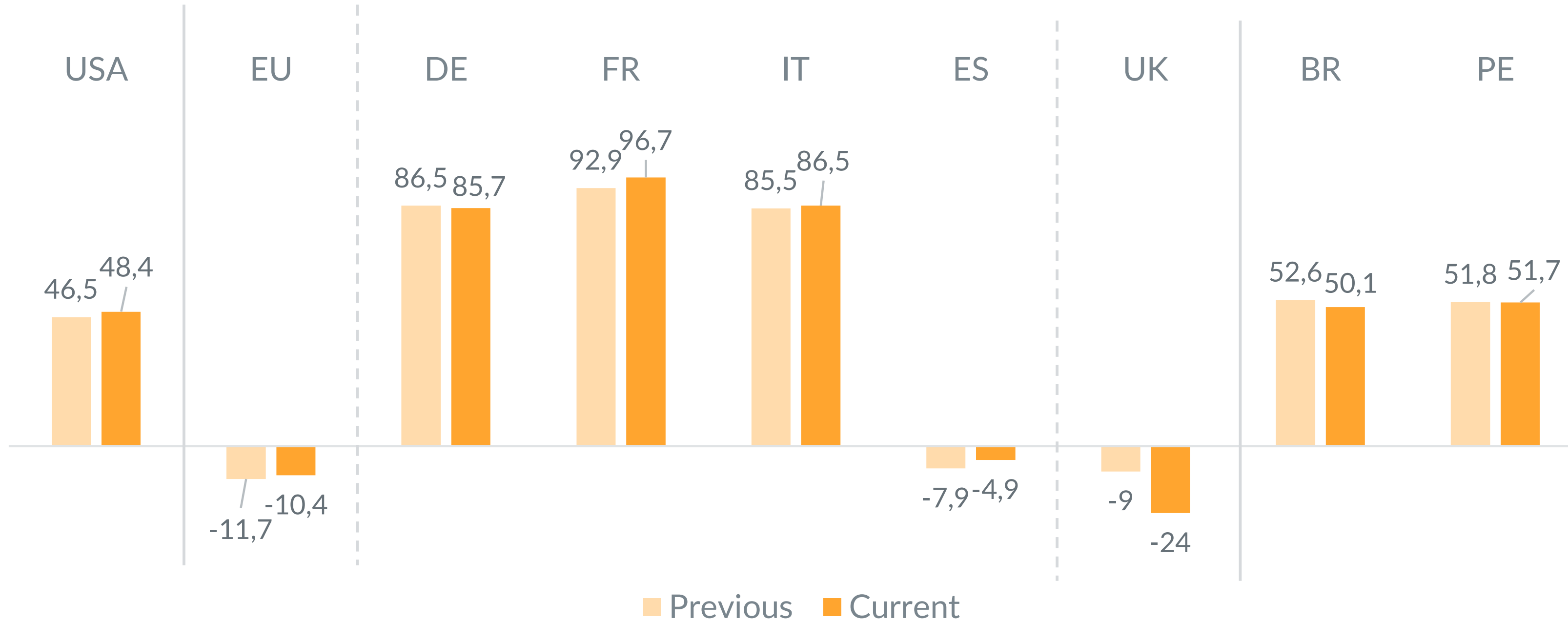
Economic challenges burden business confidence globally.

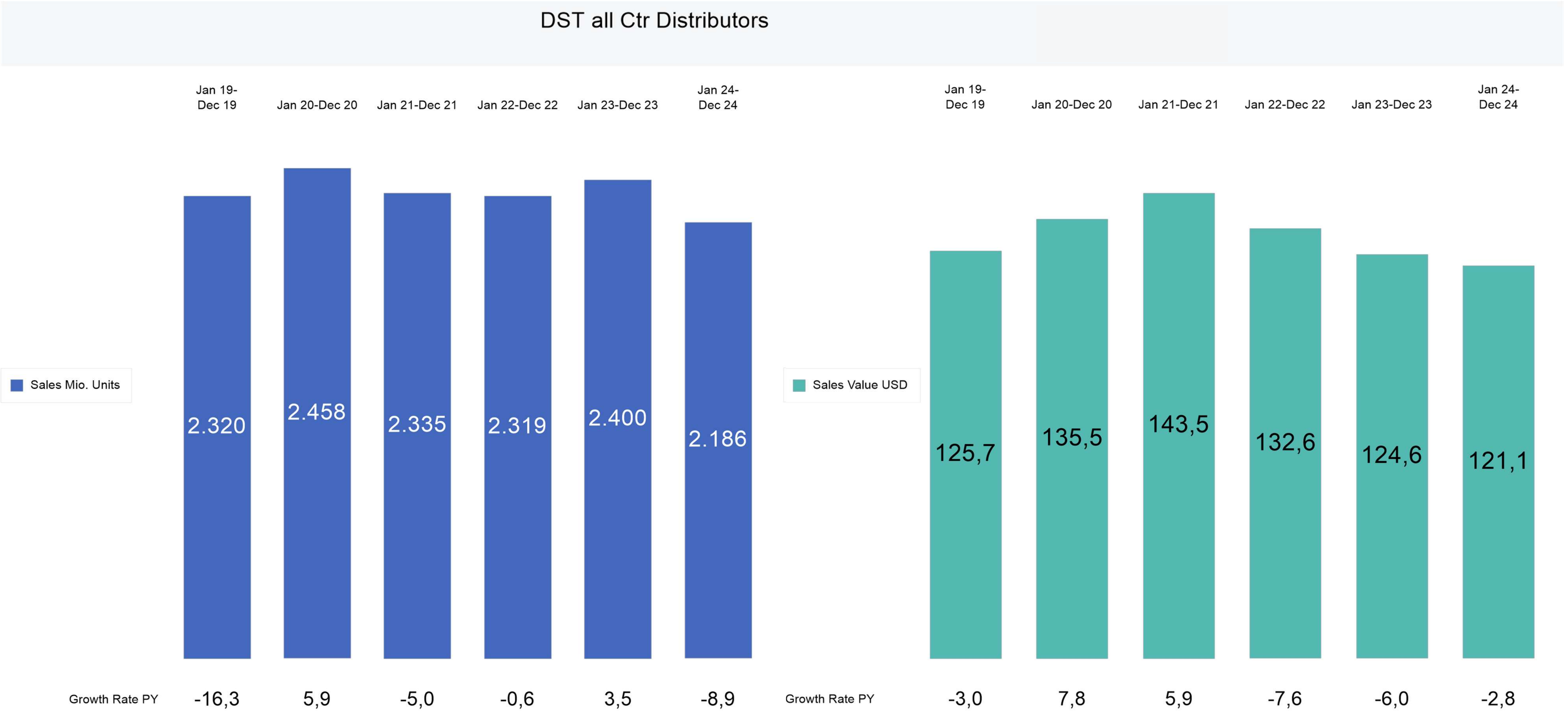
US & EU improve while UK´s business confidence even worsened.
LATAM key countries relatively stable with slight drop in Brazil.



Source: Trading Economics, Business Confidence, Update December 13, 2024

In 2024, global distribution revenue declined slightly by –3%.

Inflation compensated for decreasing demand of –9% overall.

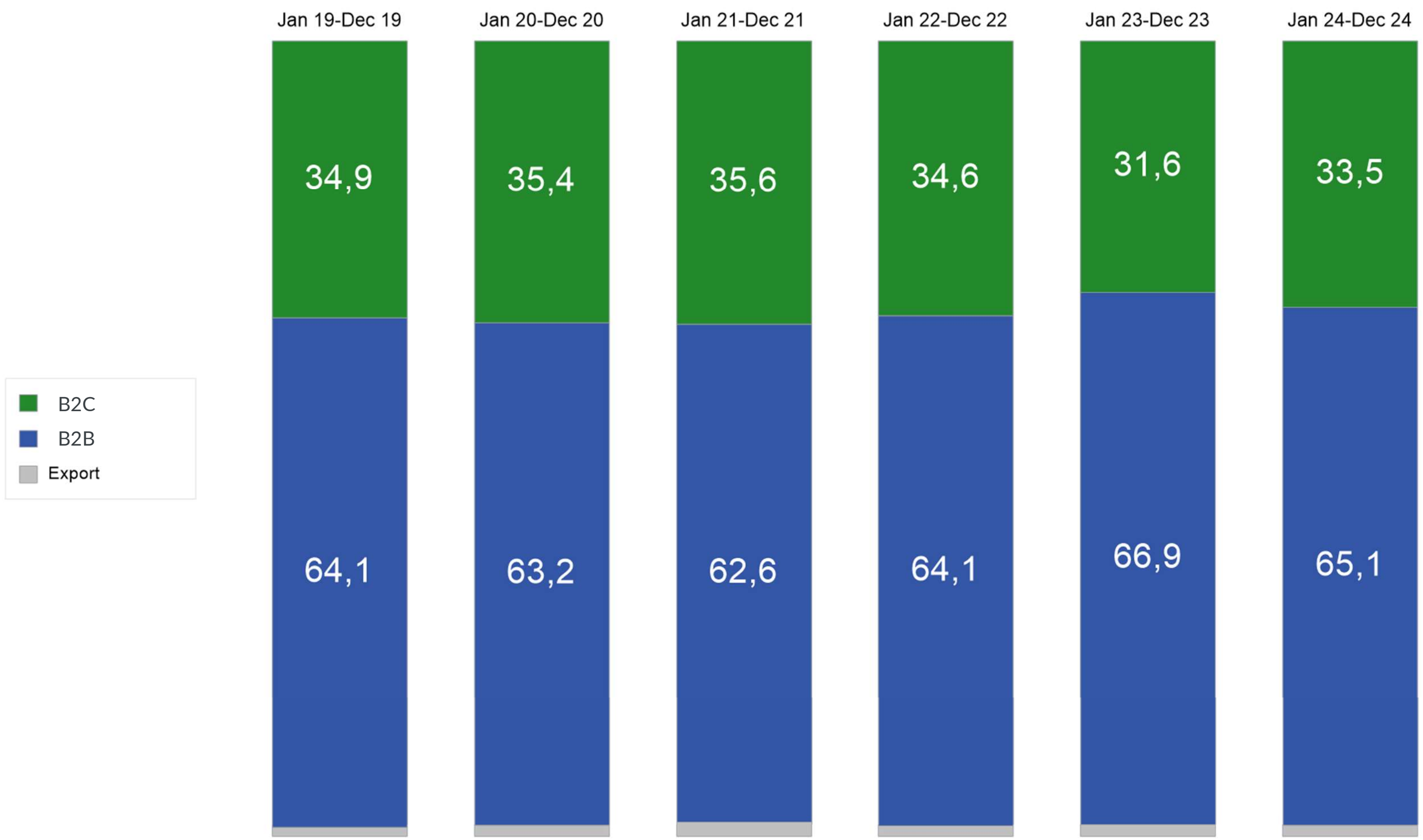


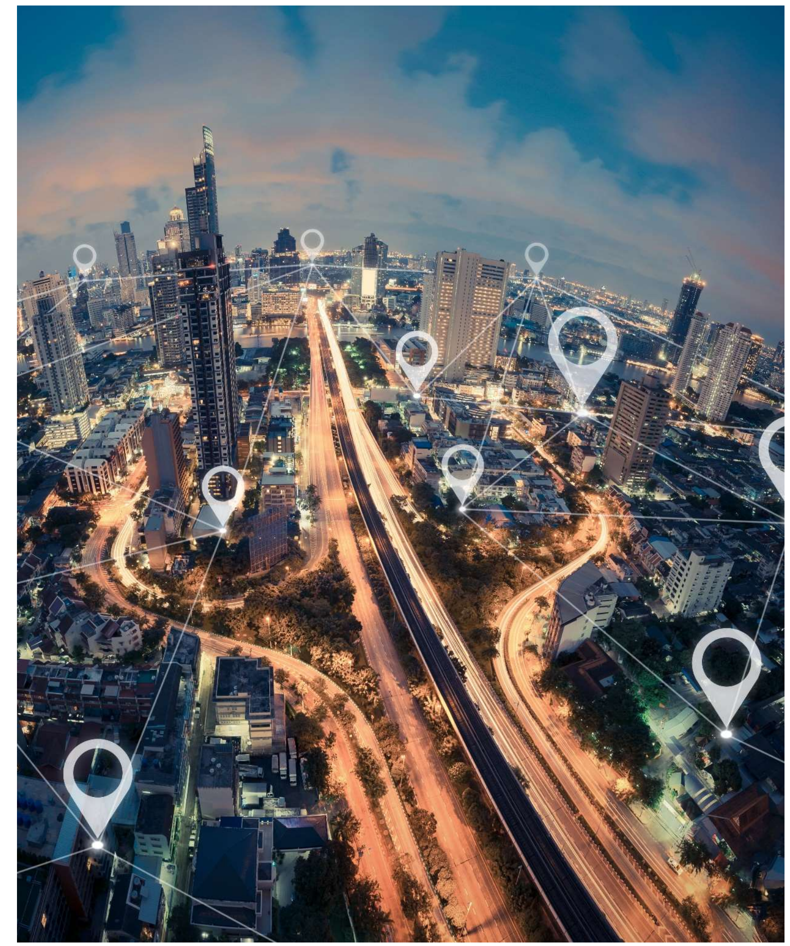
B2C demand has seen comeback following a dip in share in 2023.

B2B shares have decreased slightly but still hold a high share.

DST all Ctr Distributors

Jan 24-Dec 24
Sales Units,%





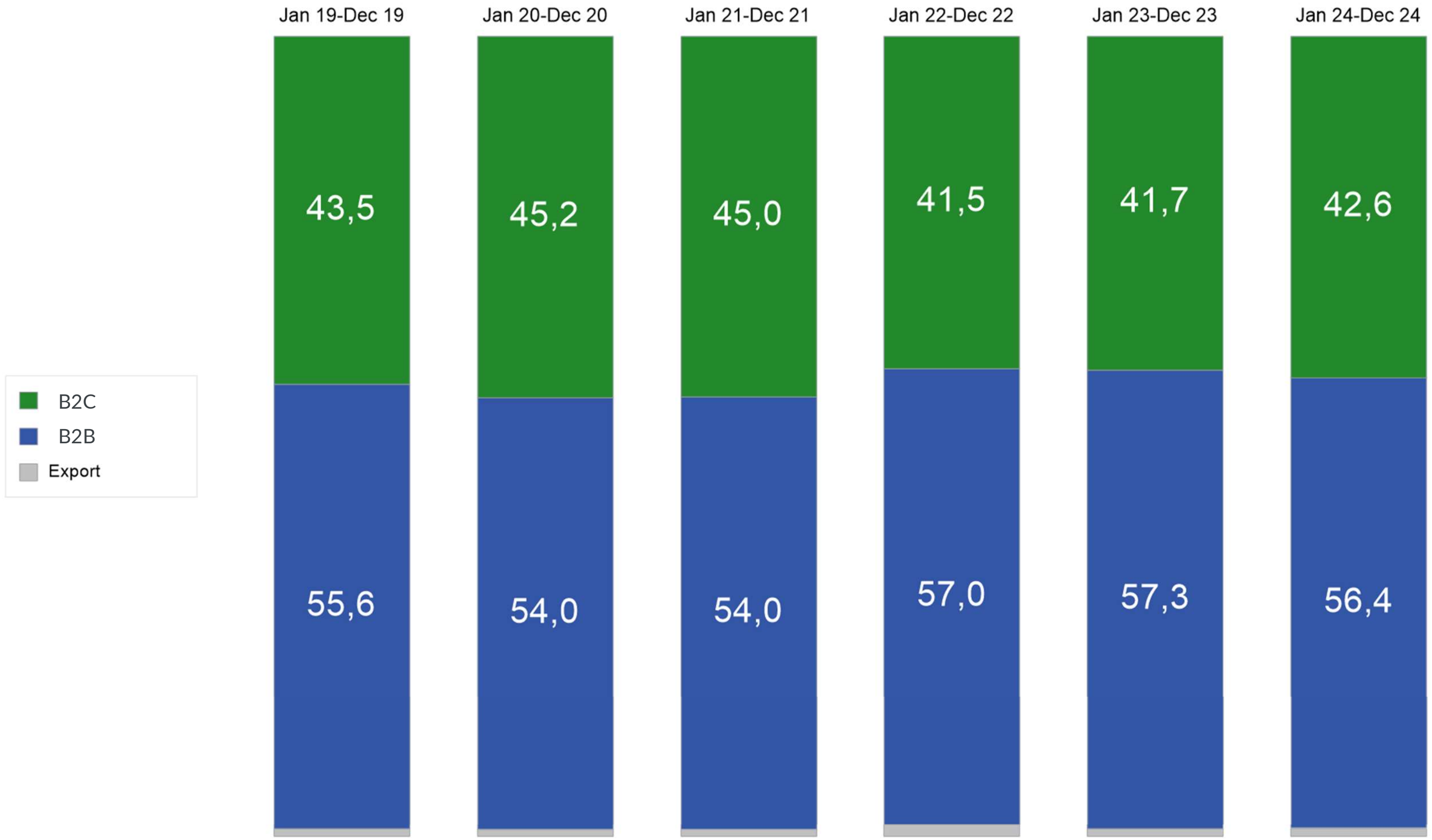
	Jan 19-Dec 19	Jan 20-Dec 20	Jan 21-Dec 21	Jan 22-Dec 22	Jan 23-Dec 23	Jan 24-Dec 24
Growth Rate PY	-16,3	5,9	-5,0	-0,6	3,5	-8,9
Growth Rate PY Retailer(+Direct)	-27,0	7,6	-4,5	-3,6	-5,3	-3,6
Growth Rate PY Reseller	-9,2	4,5	-5,9	1,8	7,9	-11,3

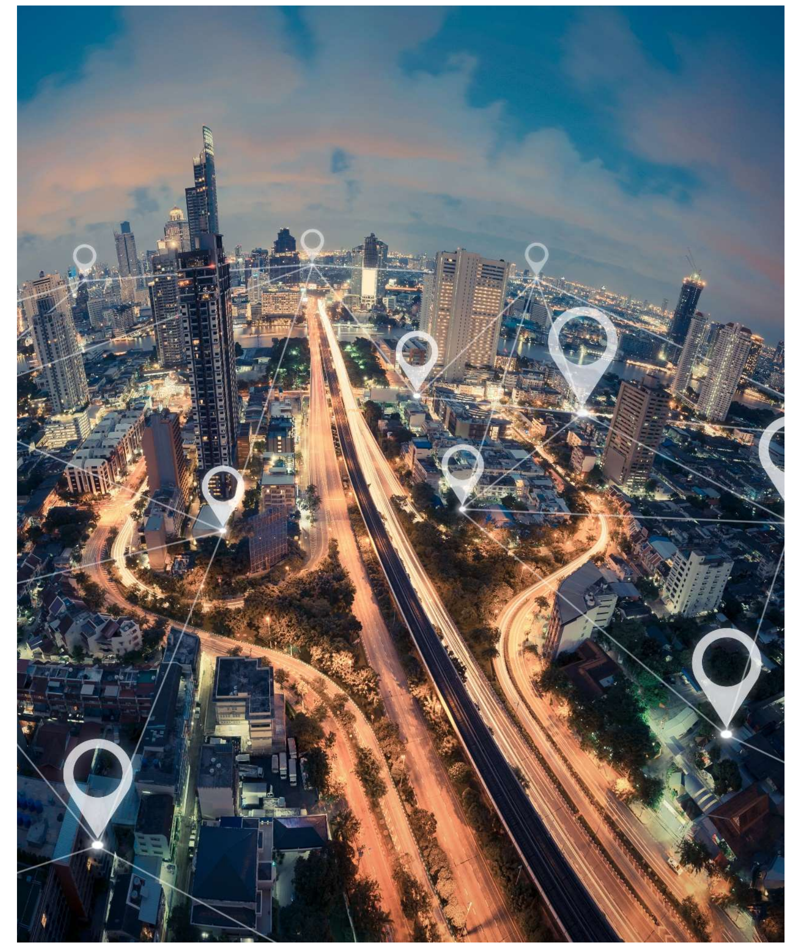
Despite slight decline YoY, B2B revenue still exceeds pre-pandemic.

Distributors´ revenue with B2C channels recovers after 2 years finally.

DST all Ctr Distributors

Jan 24-Dec 24
Sales Value USD,%

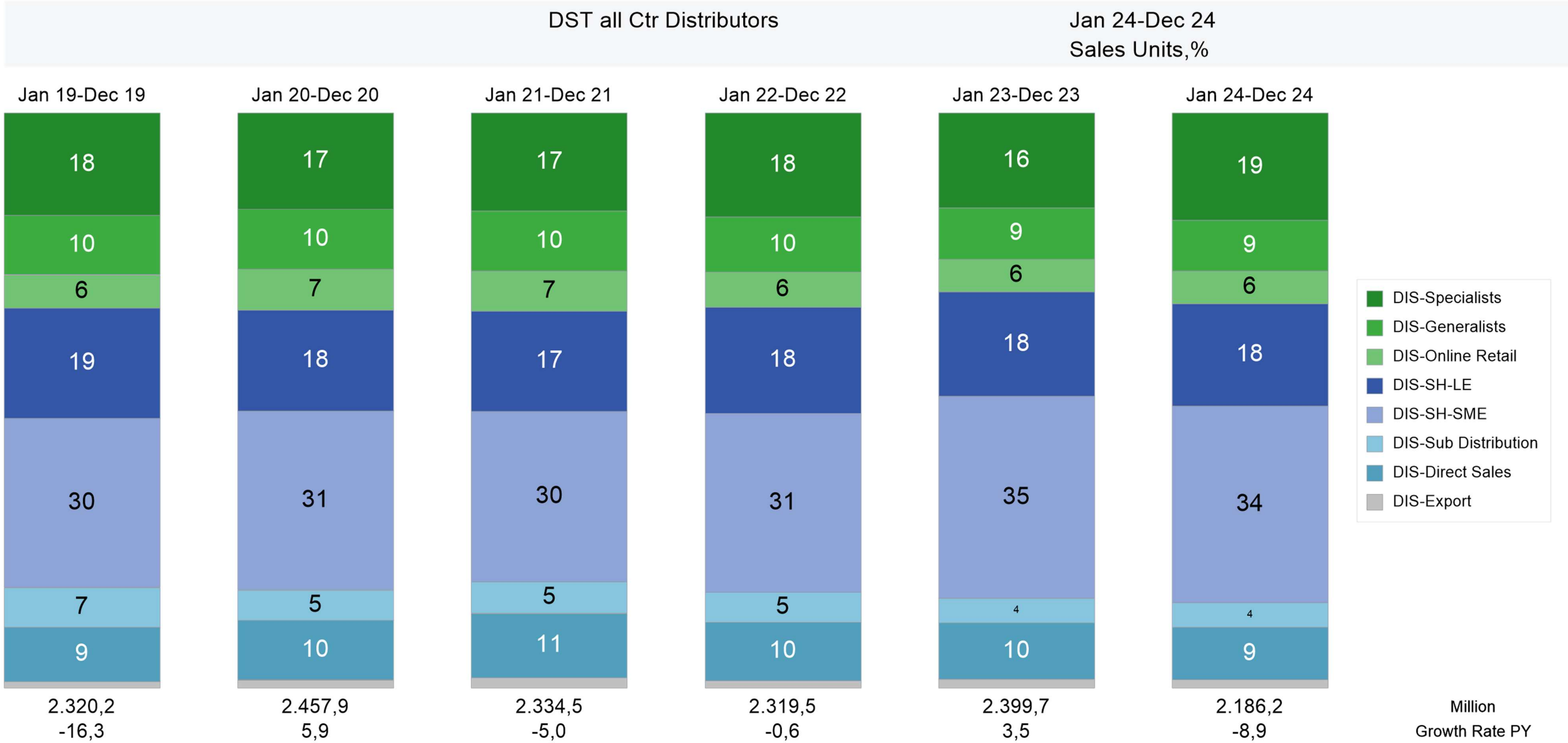




	Jan 19-Dec 19	Jan 20-Dec 20	Jan 21-Dec 21	Jan 22-Dec 22	Jan 23-Dec 23	Jan 24-Dec 24
Growth Rate PY	-3,0	7,8	5,9	-7,6	-6,0	-2,8
Growth Rate PY Retailer(+Direct)	-3,7	11,9	5,6	-14,8	-5,7	-0,6
Growth Rate PY Reseller	-2,1	4,7	5,9	-2,6	-5,4	-4,4

Increases in B2C channels were driven by Specialists mainly.

Small & medium Systemhouses continue on high demand level.



Distributors increased revenue share with System Houses over time

Share of distributors´ direct sales increased on YoY basis slightly.

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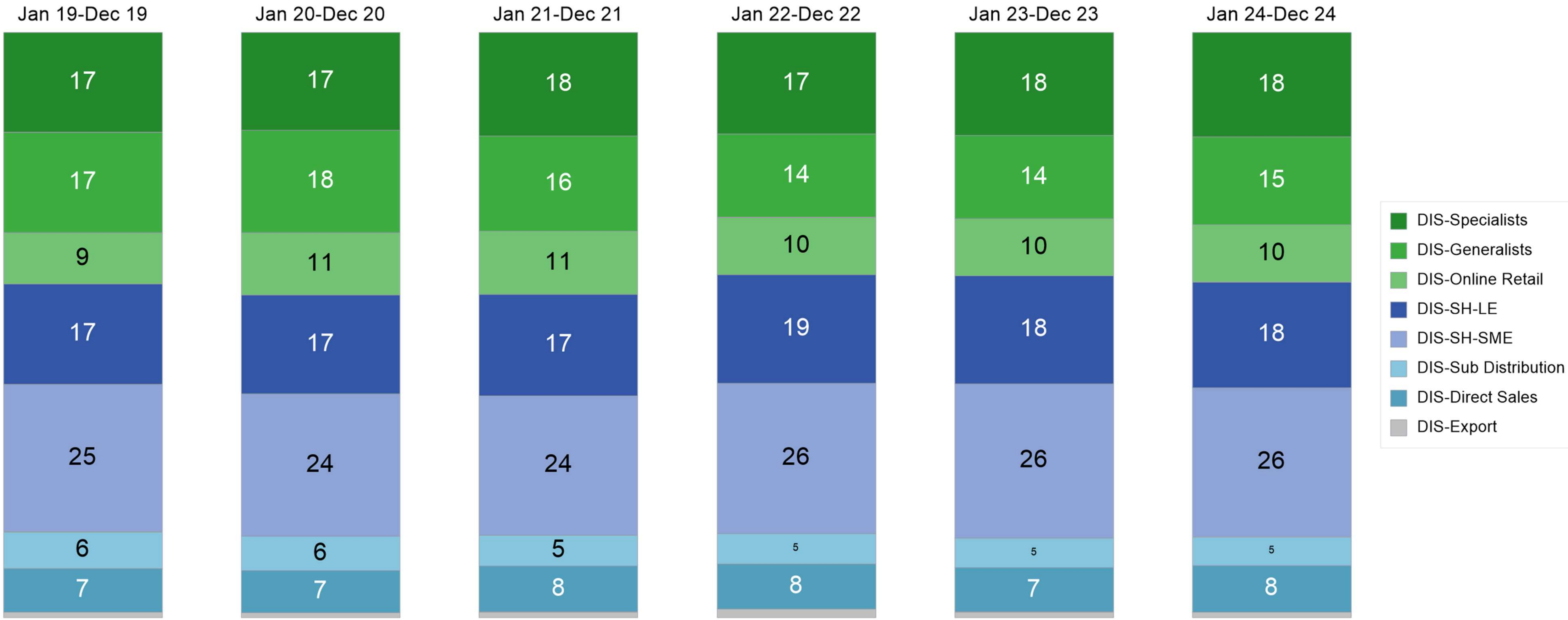

	Jan 19-Dec 19	Jan 20-Dec 20	Jan 21-Dec 21	Jan 22-Dec 22	Jan 23-Dec 23	Jan 24-Dec 24
DIS-Specialists	17	17	18	17	18	18
DIS-Generalists	17	18	16	14	14	15
DIS-Online Retail	9	11	11	10	10	10
DIS-SH-LE	17	17	17	19	18	18
DIS-SH-SME	25	24	24	26	26	26
DIS-Sub Distribution	6	6	5	5	5	5
DIS-Direct Sales	7	7	8	8	7	8
Million	125.692,4	135.504,8	143.508,5	132.580,1	124.593,0	121.117,7
Growth Rate PY	-3,0	7,8	5,9	-7,6	-6,0	-2,8

After last year´s saturation effects, IT is slowly recovering again.

Also Telecom categories show stable development after losses in the last years.

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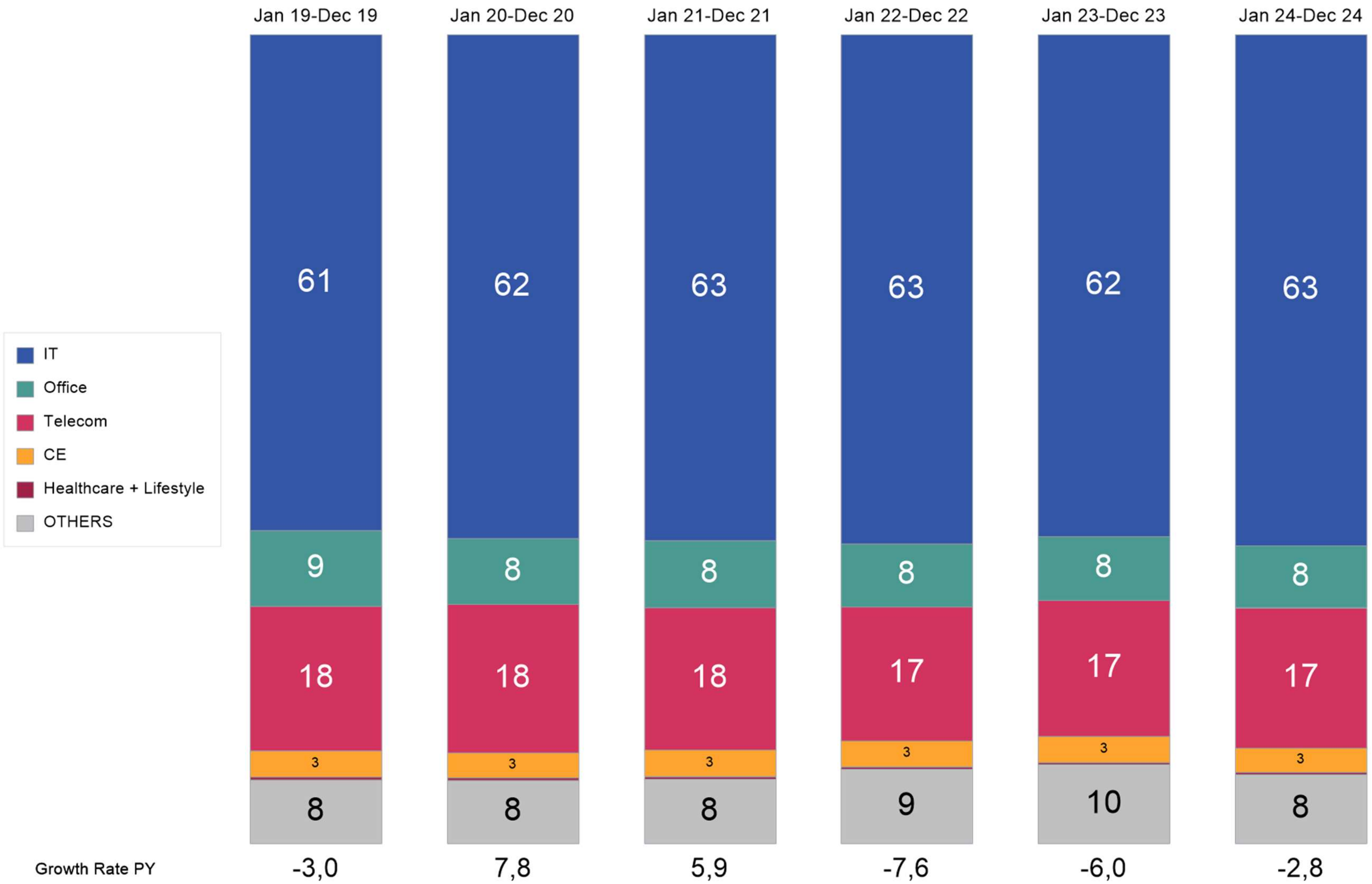
DST all Ctr Distributors

Jan 24-Dec 24
Sales Value USD,%



	Jan 23-Dec 23 -> Jan 24-Dec 24	Jan 19-Dec 19 -> Jan 24-Dec 24
IT	-1	-1
Office	-6	-21
Telecom	0	-7
CE	-8	-8

It´s emerging regions who drive value growth in both Distribution & POS.

Developed Asia and Latam are in decline

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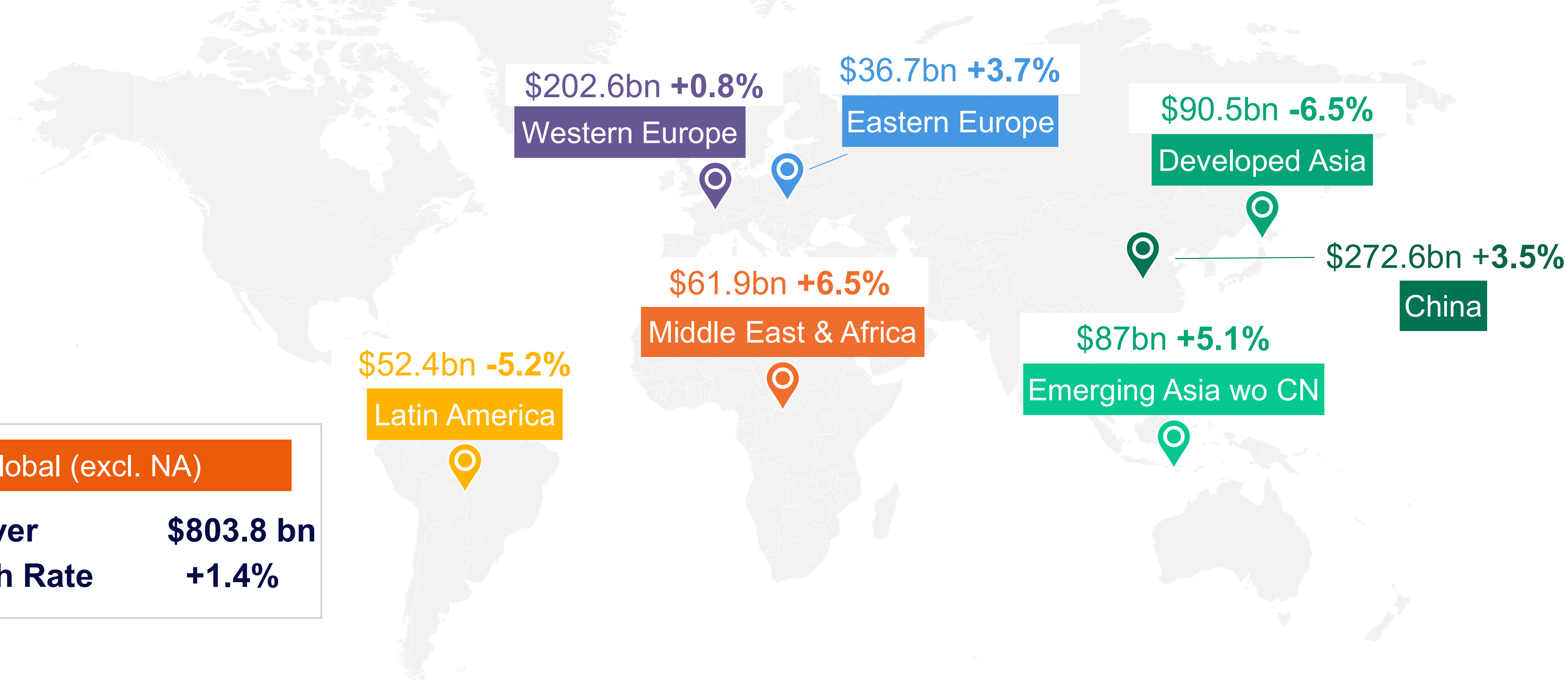
GfK

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



Global (excl. NA)	
Turnover	**$803.8 bn**
Growth Rate	**+1.4%**

Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Sales revenue growth 2024 vs 2023
Global T&D Trends Report Q4 2024 – Global Strategic Insights

Are you curious to see which growth opportunities will unfold at the Point-of-Sale in the future?

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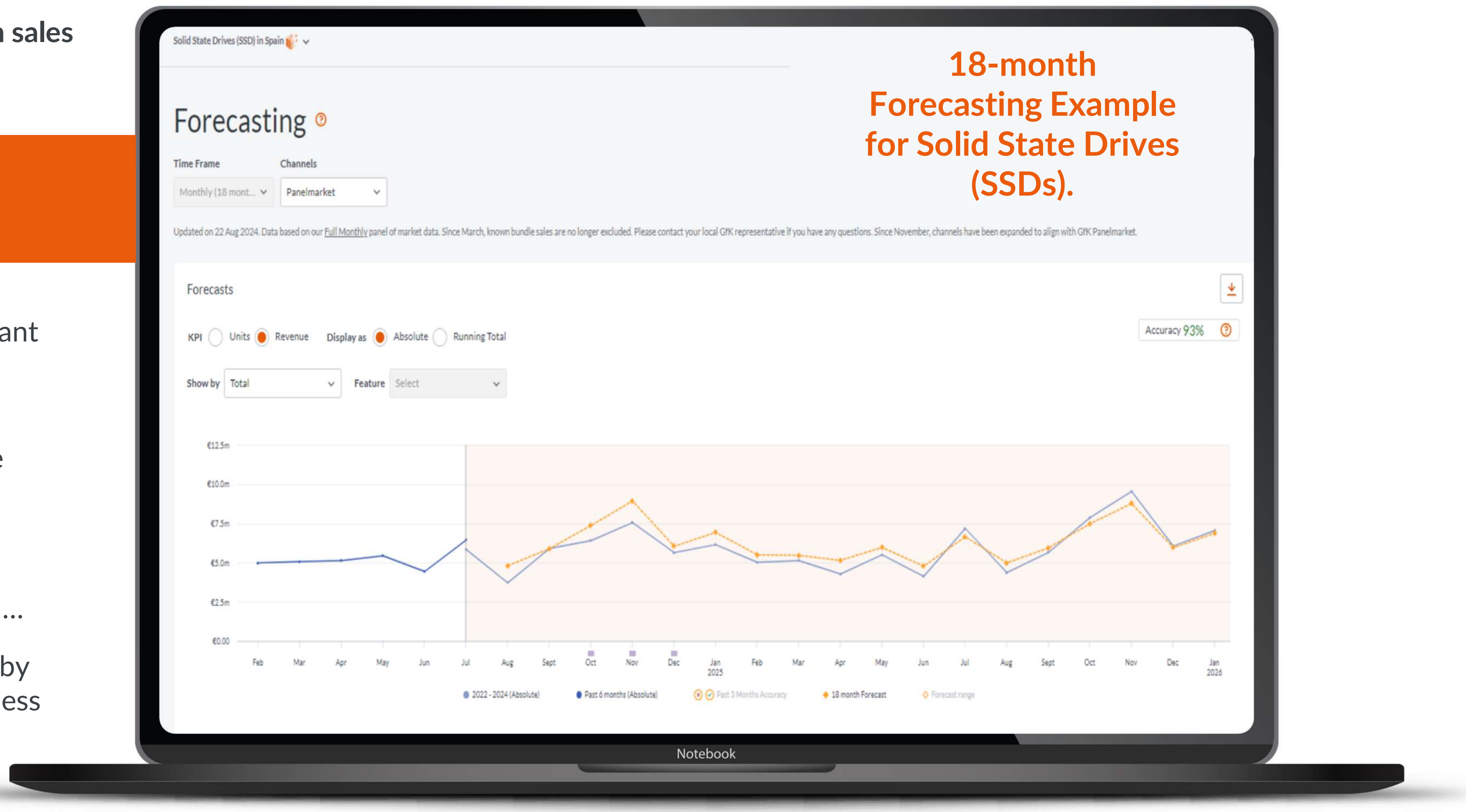
Our POS Forecasting solution provides detailed insights on sales expectations for the upcoming 18-months or 26-weeks!

- **18 months forecast:** With our 18-month forecast, add confidence in setting targets and use our trusted forecast in brand and retailer supply planning.
- **26-Week Forecast:** For weekly data access, fast track promotions and optimize stock management with relevant 26-week forecast.
- **Segment Forecast:** Provides a deeper understanding of forecasted sales with segment forecasts, enabling more precise decision-making. For Mobile PC forecast:
  - Forecast by Channel e.g. Online, Offline, Reseller…
  - Forecast by Feature e.g. Screen Size, Gaming, RAM…
- **Export functionality:** Utilize forecasts more effectively by combining them with other data sources through seamless export functionality.



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

In case of any questions or more information needed, contact us!

Your GfK distributor support team:

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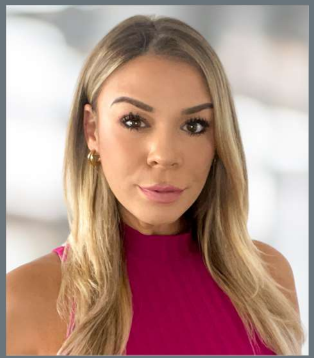

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