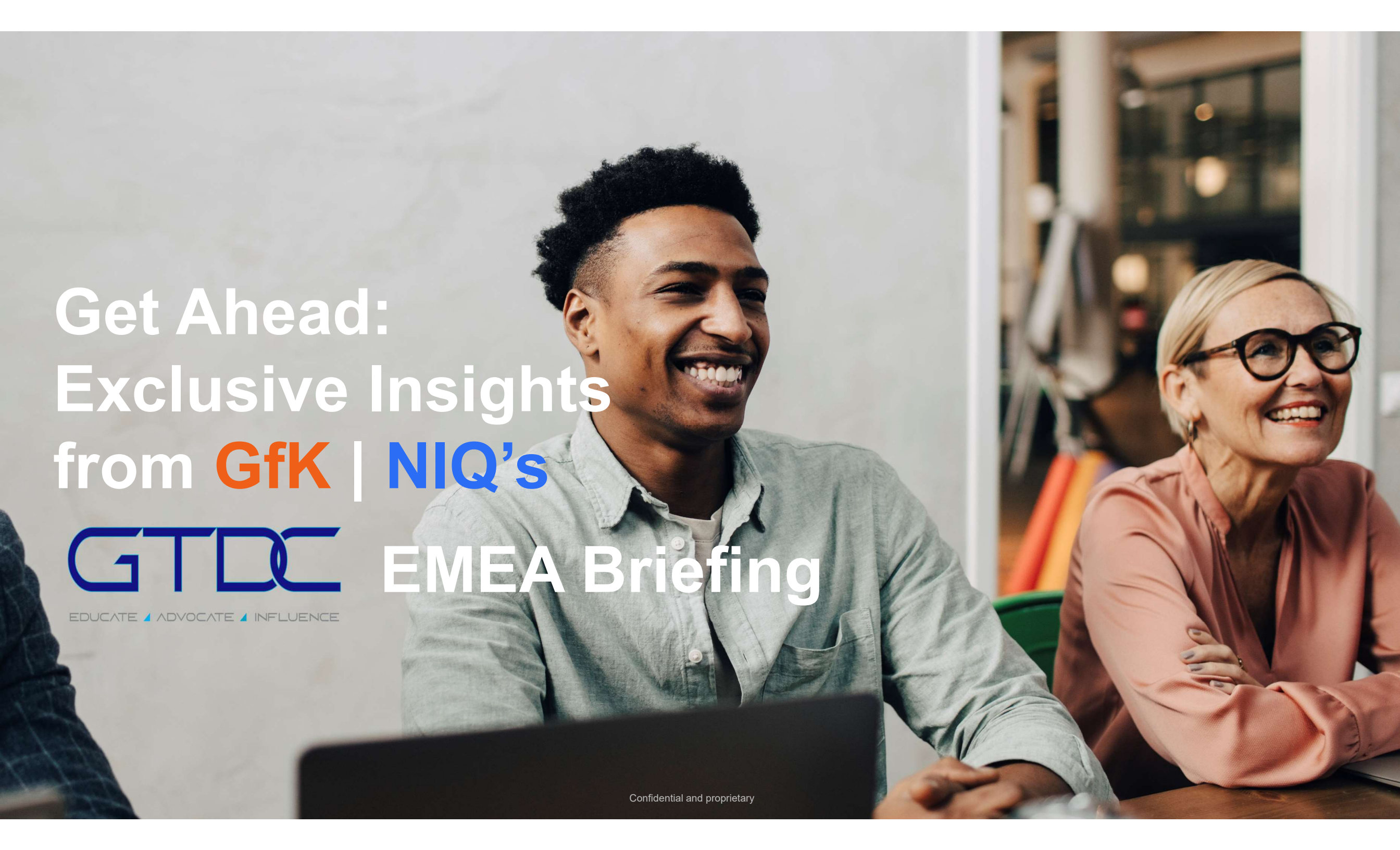


A photograph of a man and a woman sitting at a table, smiling and looking towards the right. The man is in the foreground, wearing a light blue button-down shirt. The woman is behind him, wearing a pink blouse and glasses. They appear to be in a professional setting, possibly a meeting or a presentation.

Get Ahead:
Exclusive Insights
from **GfK** | **NIQ's**

GTDC

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EMEA Briefing

Executive Summary

Key Learnings



- **Global economic growth** remains subdued, **diverging trends** among major economies are becoming more pronounced. However, a rise in **business confidence** across **key markets** signals **resilience**, with **emerging economies** continuing to **drive** the bulk of global **growth**.
- **European distribution** shows **recovery** in **2025**, led by B2B business. **IT growth** accelerates as hardware and accessories gain momentum following the **beginning of replacement cycles** and end of Windows 10 support.
- **AI PCs surpass traditional PCs** in market share, with AI hardware and software markets projected to reach \$990 billion by 2027.
Use our POS Forecasting solution on **gfknewron** for detailed sales insights over the next 18 months or 26 weeks.
- Get **customizable distribution insights** with **gfknewron Supply Chain**, on our **AI-powered** platform, **launching** in early **April**.
- Enable your complete team to **access** distribution, market, consumer and Forecasting data - whenever needed, wherever needed.

2025 IT and Distribution Rebound

Be the shapers of tomorrow

Extract the signals from the noise & accelerate your business



Combine both for powerful supply chain insights!



Distribution & Supply Chain Intelligence

Fast track your market performance, benchmark yourself and identify new business potentials across 45+ countries and 300 partners worldwide.



POS Market Intelligence

Track PoS sell-out in over 70 countries to align your sales strategy with real customer demand and market performance.



gfknewron Forecasting

Forecast with confidence using PoS sell-out insights that help distributors plan ahead, optimize supply and demand, manage stock, and meet demand confidently.



GfK Catalogs

Support smarter distribution sales with ready-to-use catalogs filled with product images, specs, and content that sells.



One single Platform augmented by GfK Customer Success team.

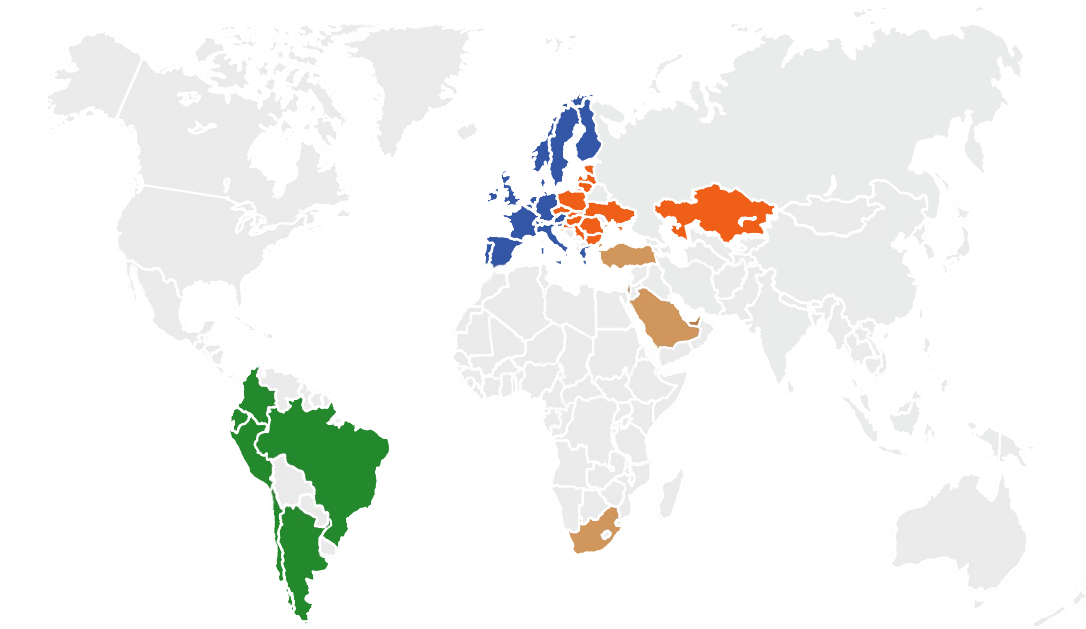


Consulting service for strategic questions and business strategies.

Integrate in your product catalog to harmonize product information globally

Largest global coverage of distribution partners*

Benefit from local & regional expertise in 45+ markets



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

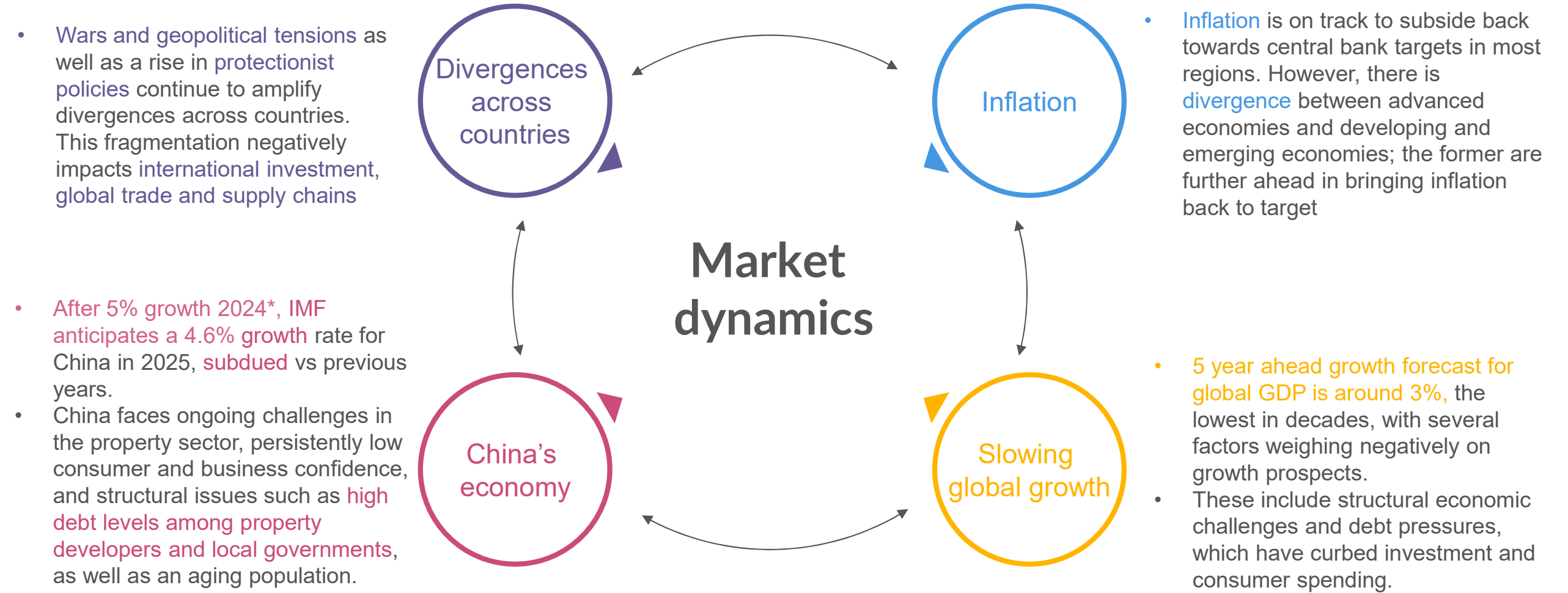
Macroeconomic Trends

NielsenIQ



Subdued global economic growth overshadowed by divergence among major economies

Major themes continue to disrupt market growth and inject further uncertainty



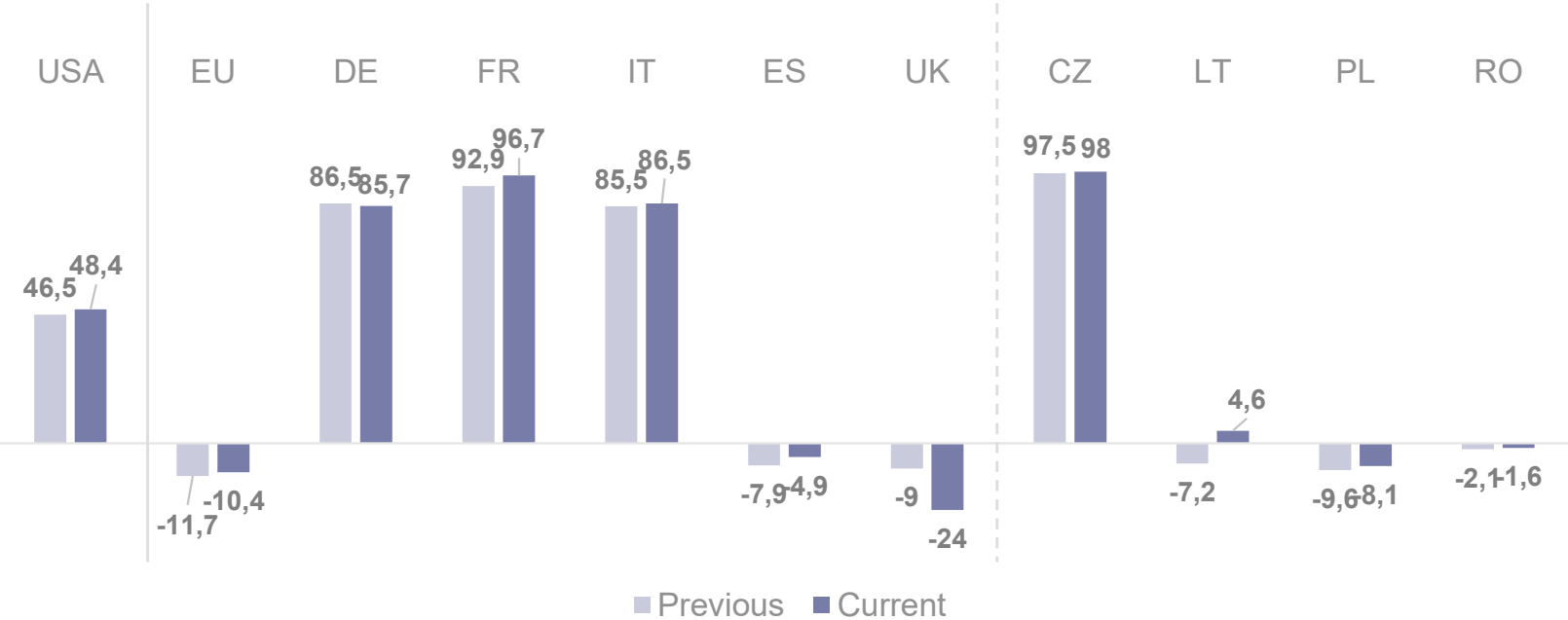
* Reuters

Burdened business confidence

However, key markets have recently been able to gain in business confidence

Especially EEU countries are recovering at a fast pace

Economic challenges burden business confidence globally
US & EU improve overall while UK's business confidence even worsened

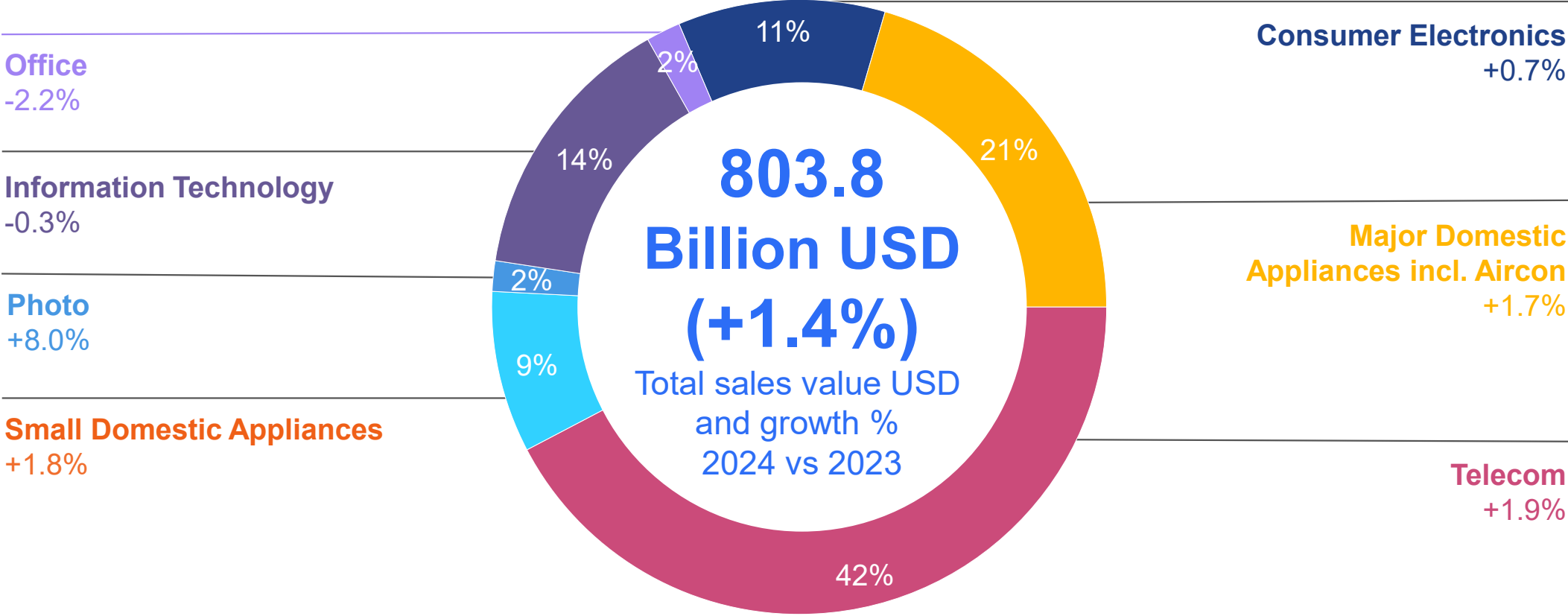


Source: Trading Economics, Business Confidence, Update December 13, 2024

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

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

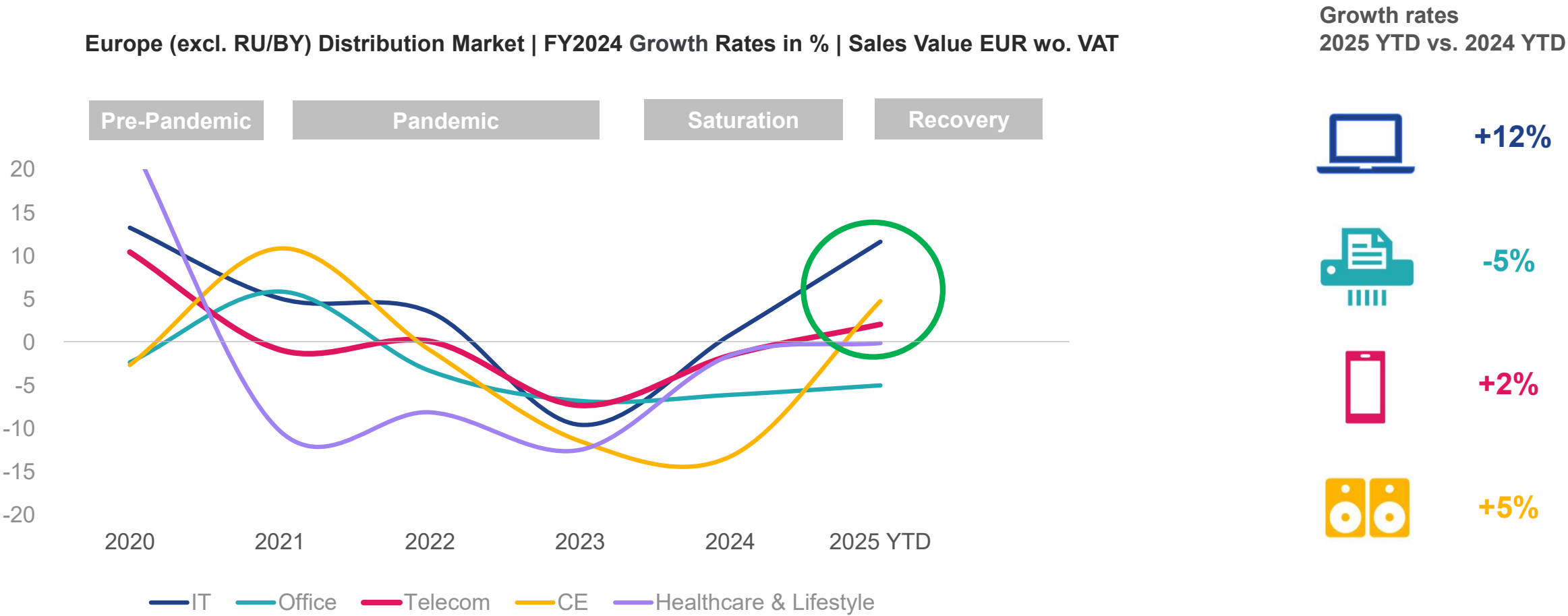
Global (ex. NA, RU) Point-of-Sale Markets, Tech and Durables | Sales Value USD (NSP) | Growth rate YoY (%) | Jan 2024 – Dec 2024



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

Sectors Move Beyond Negative Growth, Approaching Pre-Pandemic Levels

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

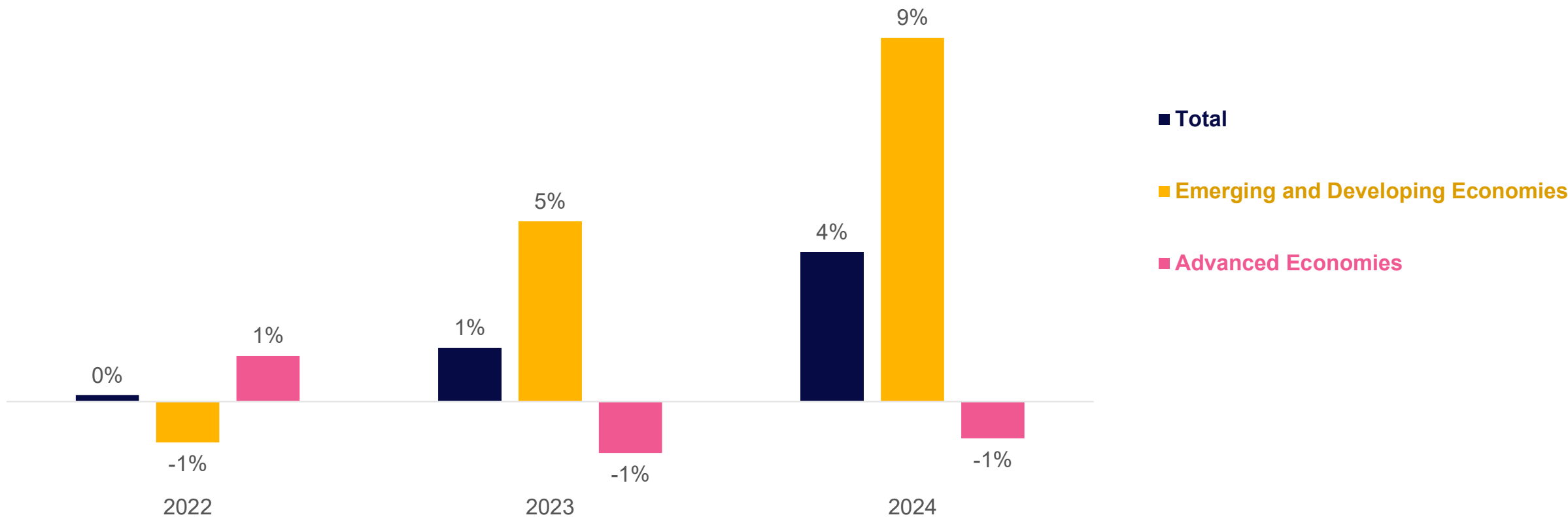


Source: GfK MI: Supply Chain, EUROPE excl. RU/BY, Growth Rates Sales Value EUR wo VAT, all channels, all product groups

Emerging Markets Drive Strong Growth, While Advanced Economies Face Headwinds

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

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



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

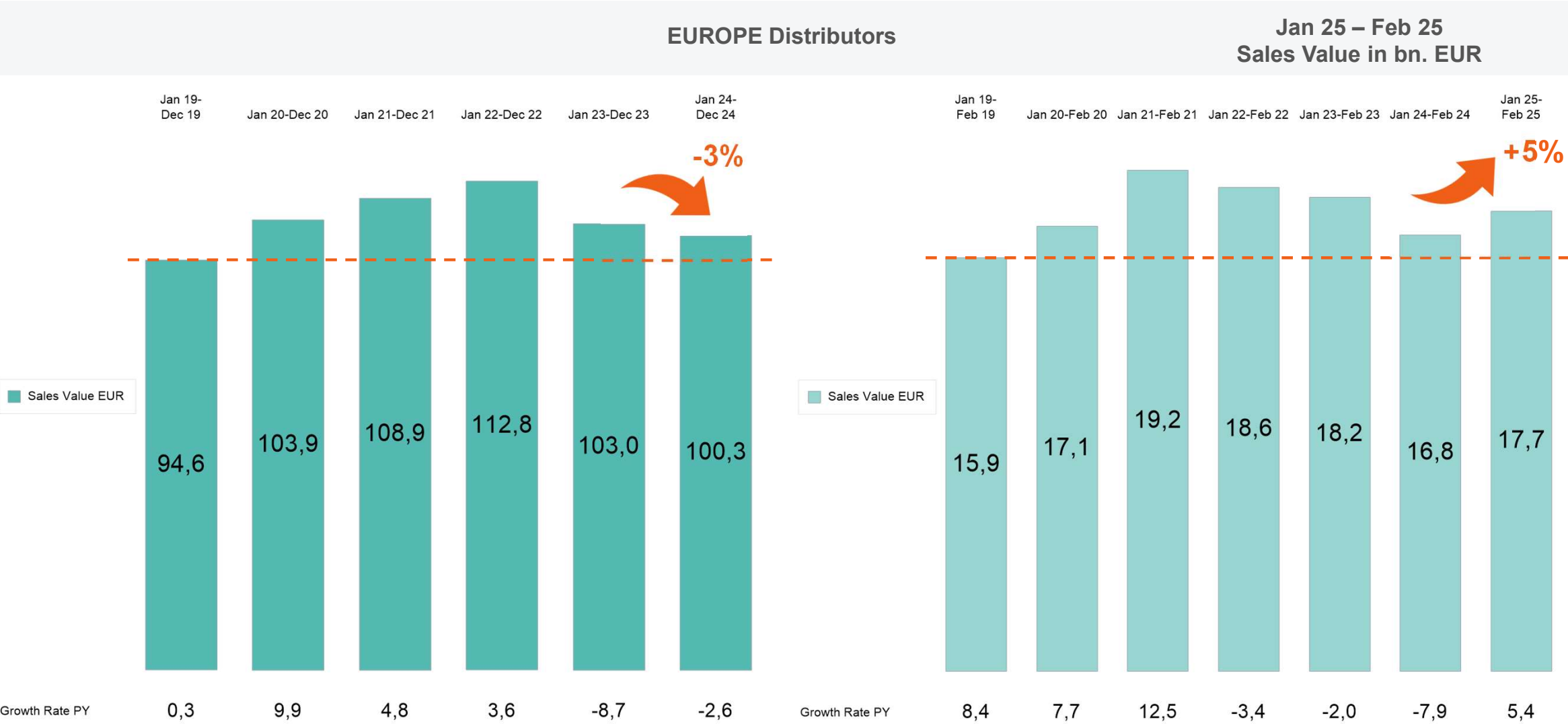
European Technology & Distribution Market Trends

NielsenIQ



European Distribution Rebounds with a Strong Start to 2025

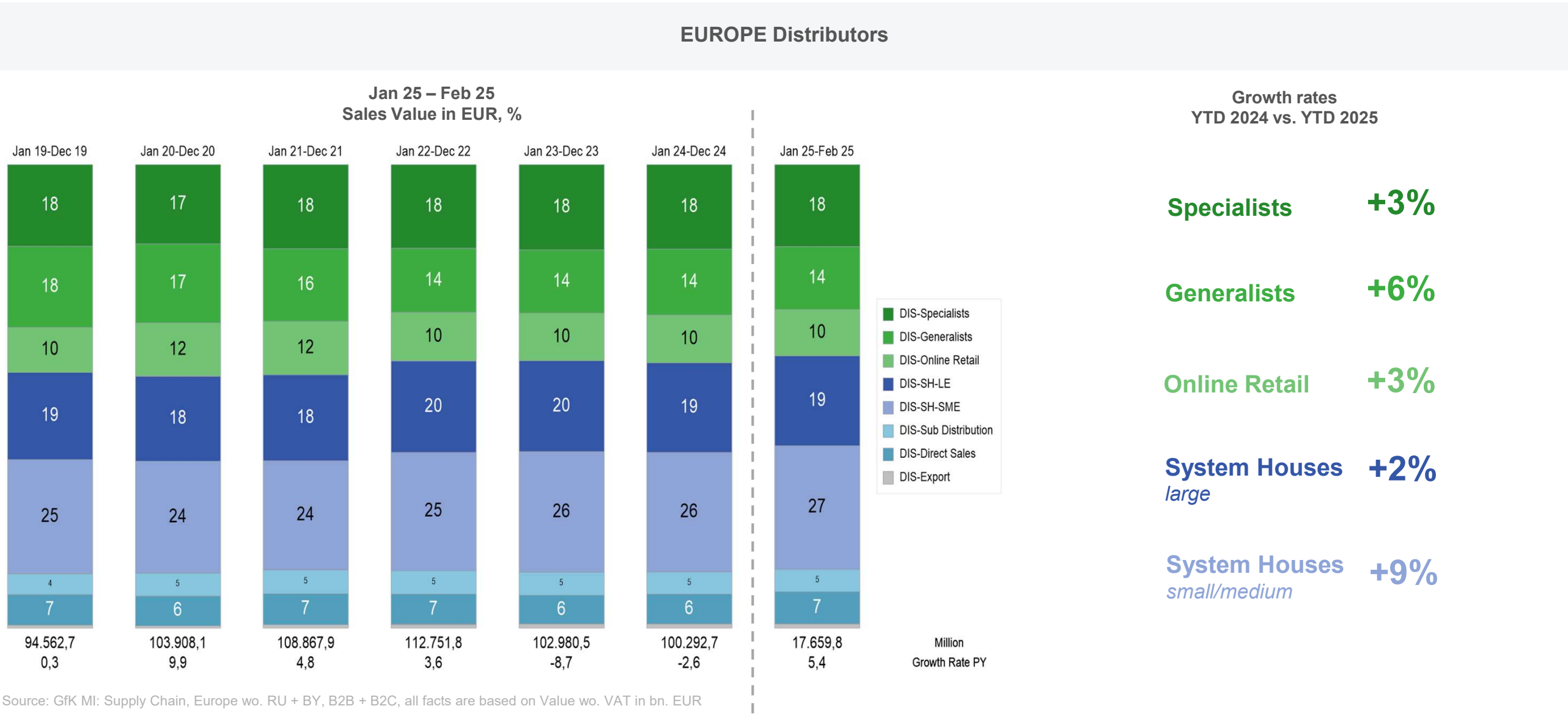
This promising start indicates a positive trajectory for the rest of the year



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

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

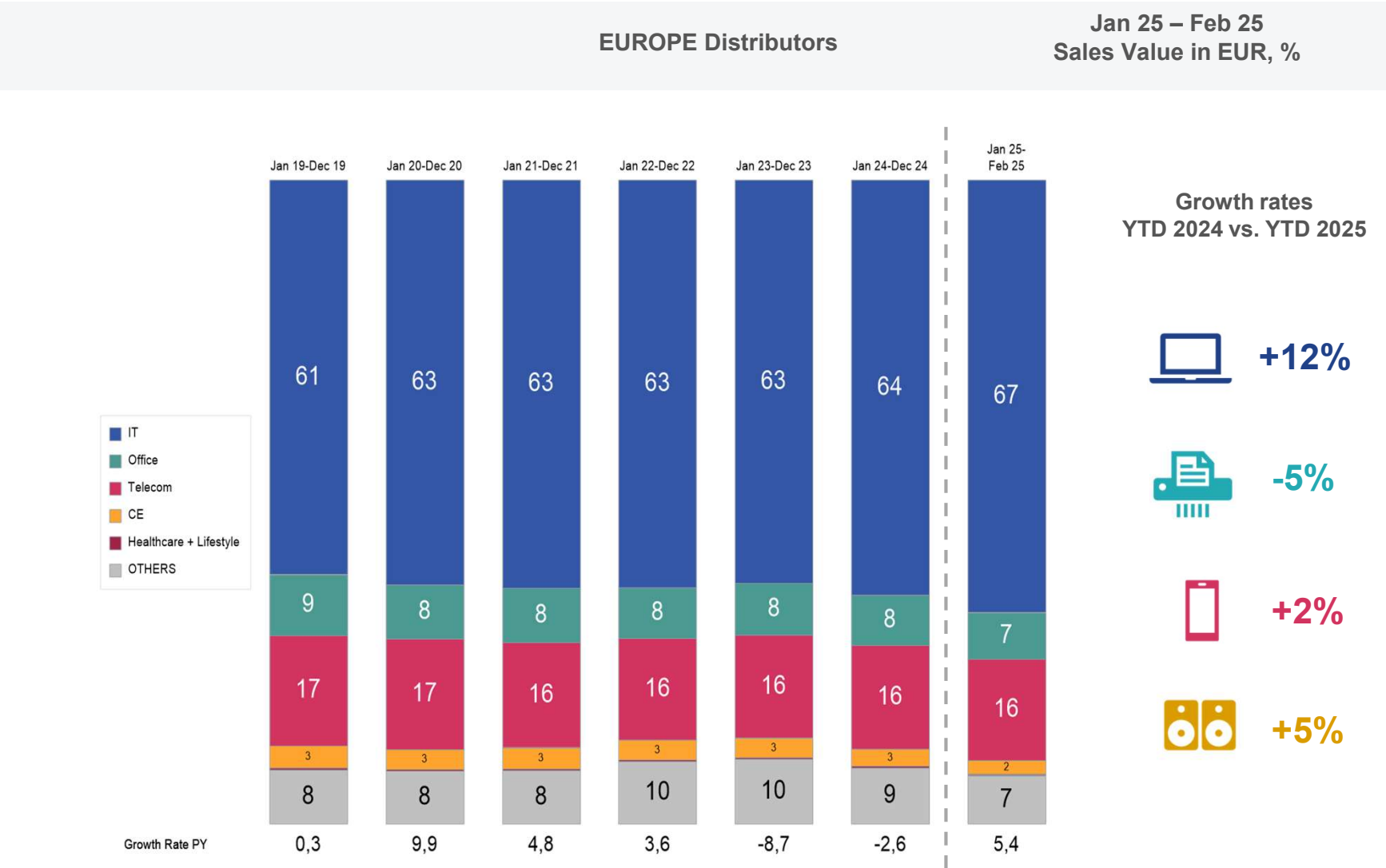
Generalists grow +6% YoY, but continue to decline in overall share since the pandemic



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

IT Growth Surges in Early 2025 as Replacement Cycles Ends

As IT hardware demand rebounds (+12%), Telecom (+2%) also benefits from recent innovations and new product releases

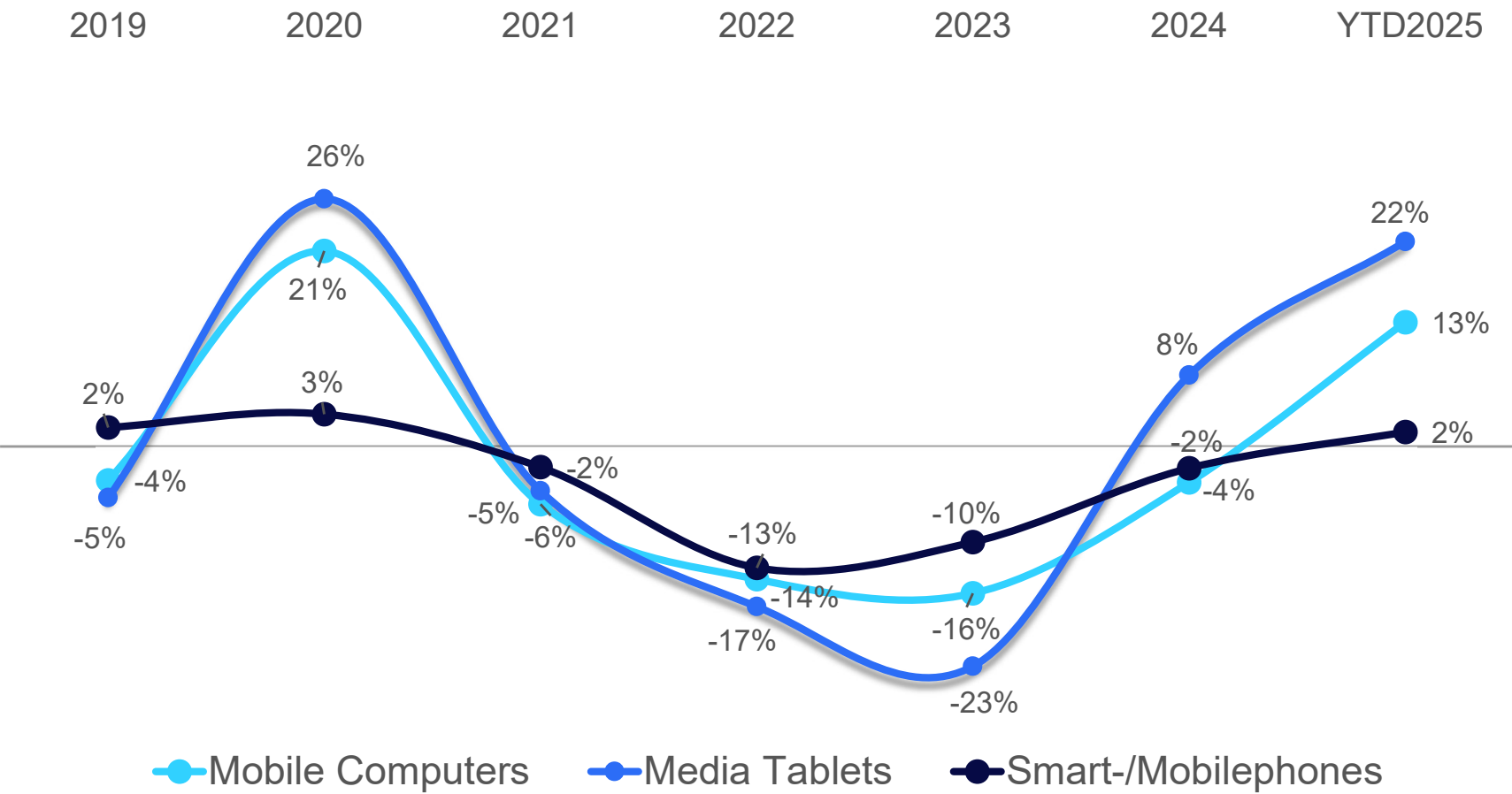


Source: GfK MI: Supply Chain, Europe wo. RU + BY, B2B + B2C, all facts are based on Value wo. VAT in bn. EUR

gfknewron Reveals: 2025 will be the Year of Replacements

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

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



Average age of previous product



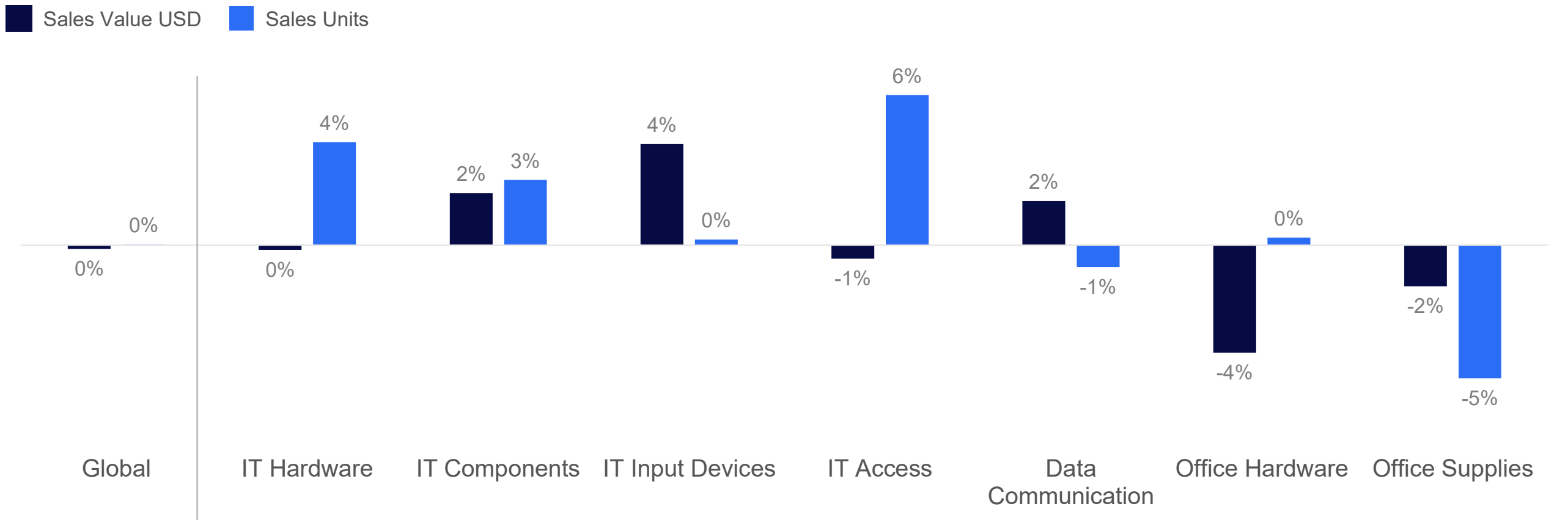
Source: GfK MI Supply Chain, Global excl. RU/BY and APAC, Sales Unit Growth per year until 2025 (Jan)

Source: gfknewron Consumer, Av. Age of previous product

IT Hardware and Accessories Drive Growth Amid Selective Spending

Hardware grows in units thanks to monitors and media tablets sales

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

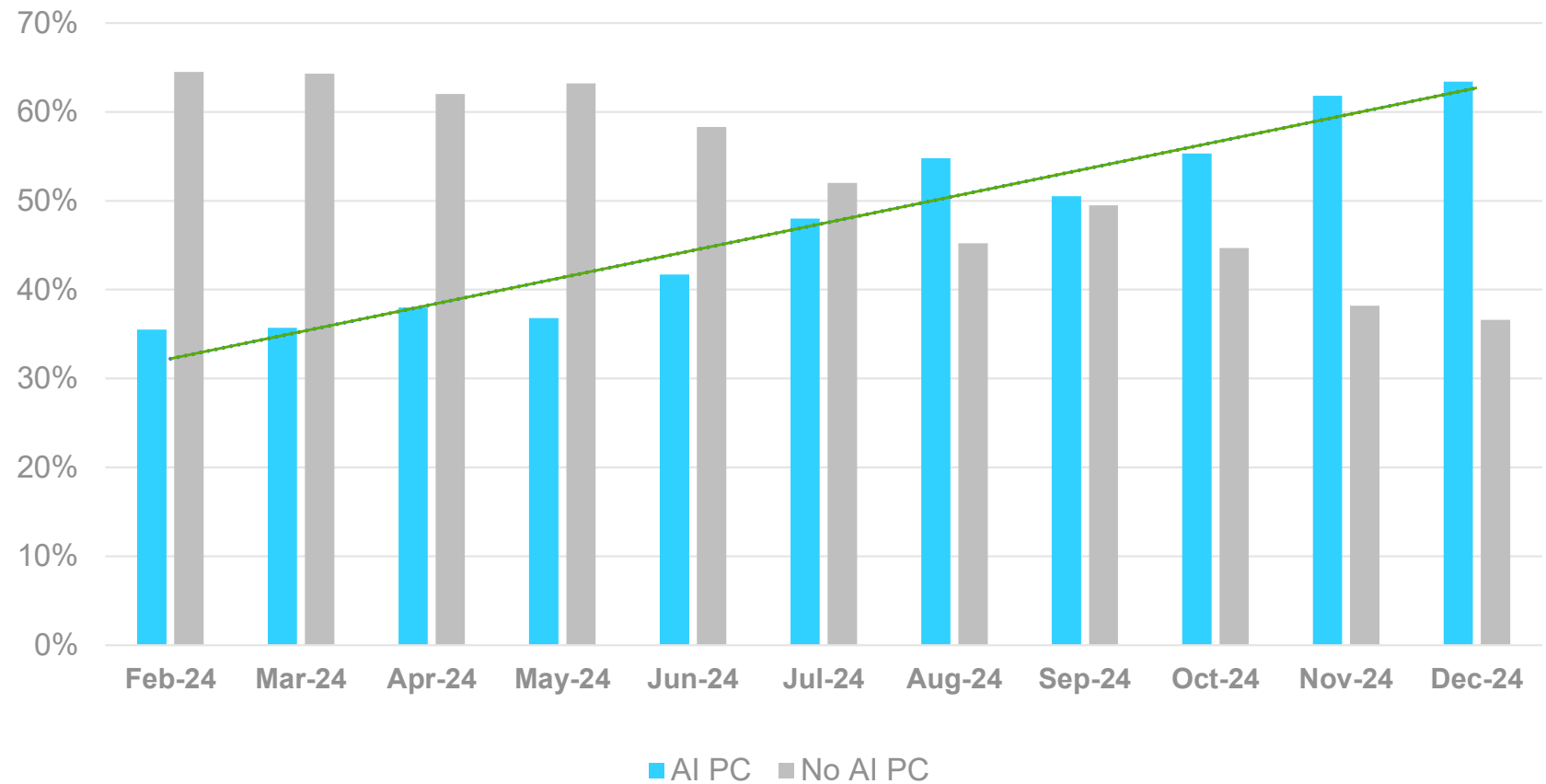


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America and Russia), Retail Channels | Global includes a total of IT hardware, IT components, IT input devices, IT Access, Data Communication, Office Hardware & Office Supplies

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

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

EUROPE Distributors FY2024
Sales Value EUR wo. VAT, Share

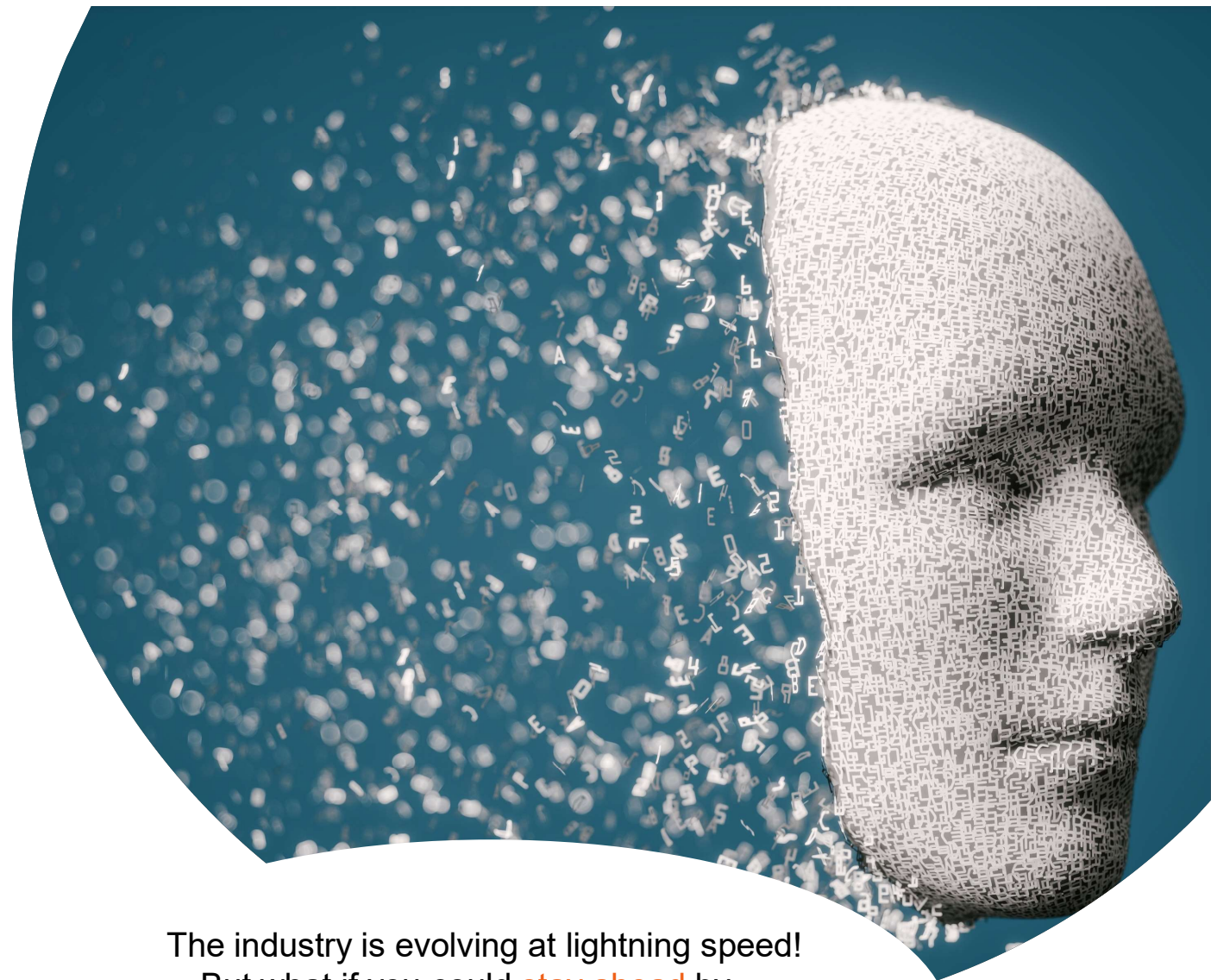


Source: GfK MI: Supply Chain, Europe wo. RU + BY, B2B + B2C, all facts are based on Value wo. VAT, share

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

\$990 billion

US dollars by 2027



The industry is evolving at lightning speed!
...But what if you could **stay ahead** by
predicting market **shifts**?

Buckle up for **gfknewron** Forecasting...



Source: [Bain & Company](#)



GTDC Summit EMEA Briefing Deck: Key Market Insights for Confident Conversations | GfK NIQ Distribution & Supply Chain

powered by



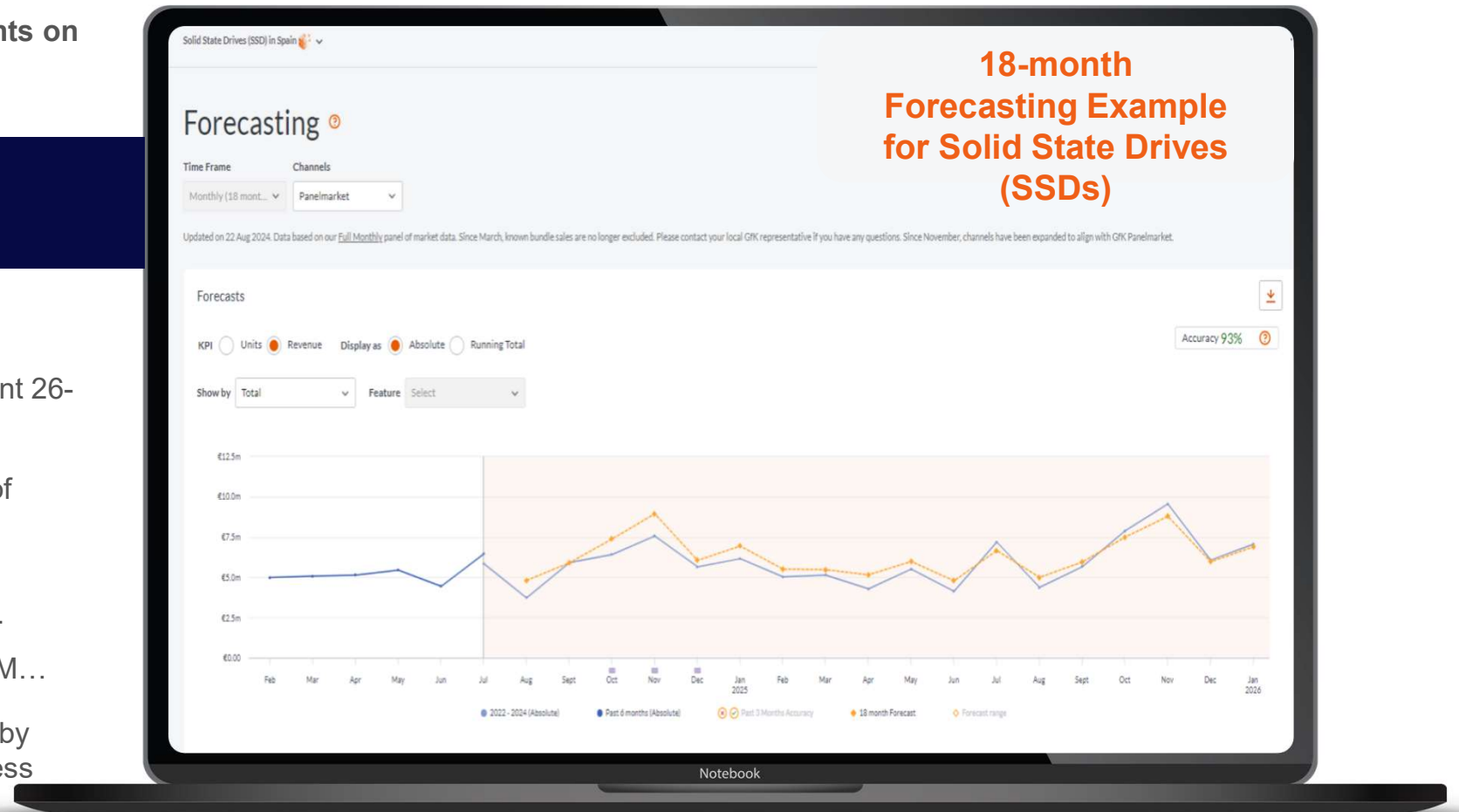
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What if you could predict the next big opportunities at the Point-of-Sale before they happen?

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

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

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



Global eCommerce Sustainability Solutions for Distributors

GfK Catalogs

NielsenIQ



Did you know?

We track **120+**
sustainability attributes!



GfK Catalogs

...provides standardized
product data catalogs for more
than 20 million products in
multiple languages globally



20.4 M

Global Products
in Catalogue



70,505

Brands
represented



76

Global markets
served

**Get access to product data, product images, marketing text,
product specifications, merchandising information, rich
content and more in various product data catalogs available
around the world.**

Oh, and just so you know...
2025 just leveled up!

Launching in April: **gfk**newron Supply Chain!

Supply Chain Insights, your way.

Access the insights you need, exactly when you need them, with analysis you and your teams can fully customize on our AI-powered platform **gfknewron**.

Look out for an
onboarding E-Mail
in April!



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Questions, ideas, or challenges?

Your **GfK** | **NIQ** Supply Chain Intelligence team has your back!



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