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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 Q3 / 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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Contact: Global Strategic Insights

GfK Market Intelligence: Sales Tracking

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Commanding the market requires immediate access to the most current, unbiased sales information. GfK Market Intelligence: Sales Tracking is your compass in this dynamic landscape, offering a clear view of market movements, competitor benchmarks, and growth opportunities – all based on the most current sales data from retailers and resellers.

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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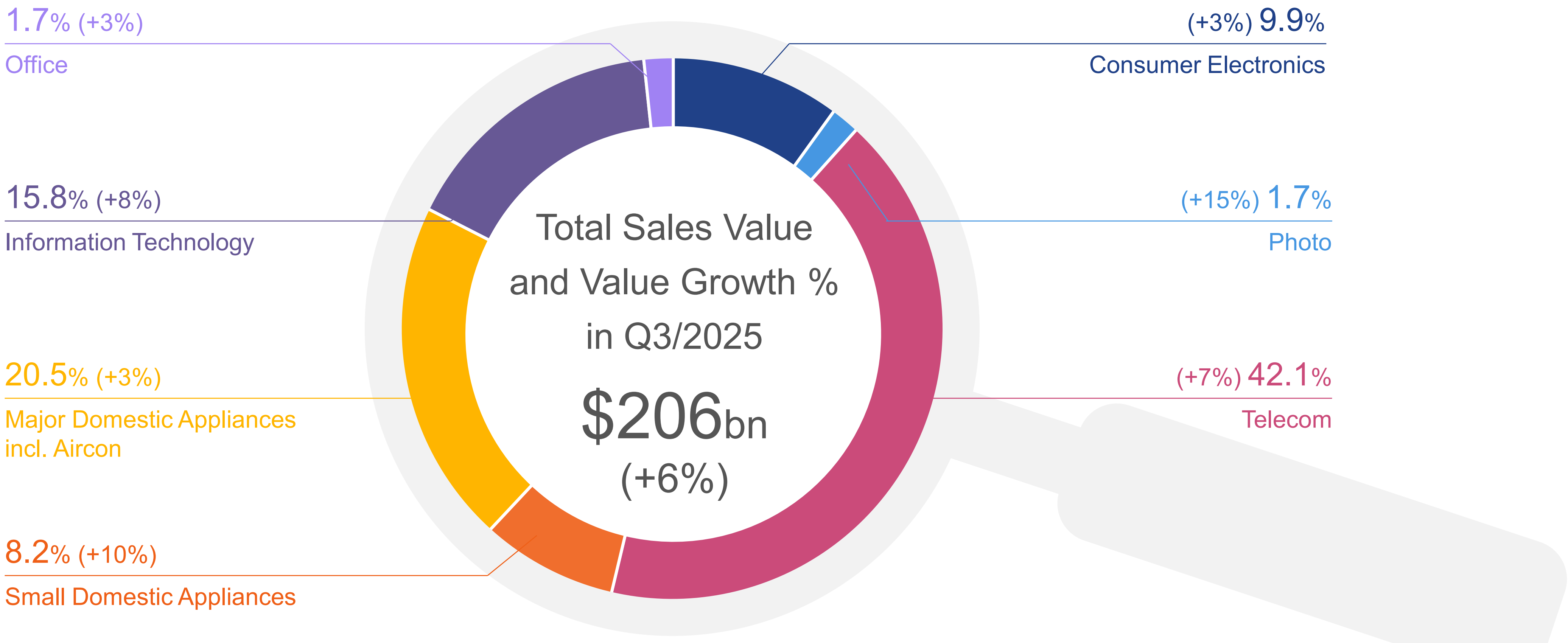
Tech & Durables total market continued to grow, driven by replacement purchases in IT.

Sales value USD value shares & growth / Q3/2025



Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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

World

Western Europe

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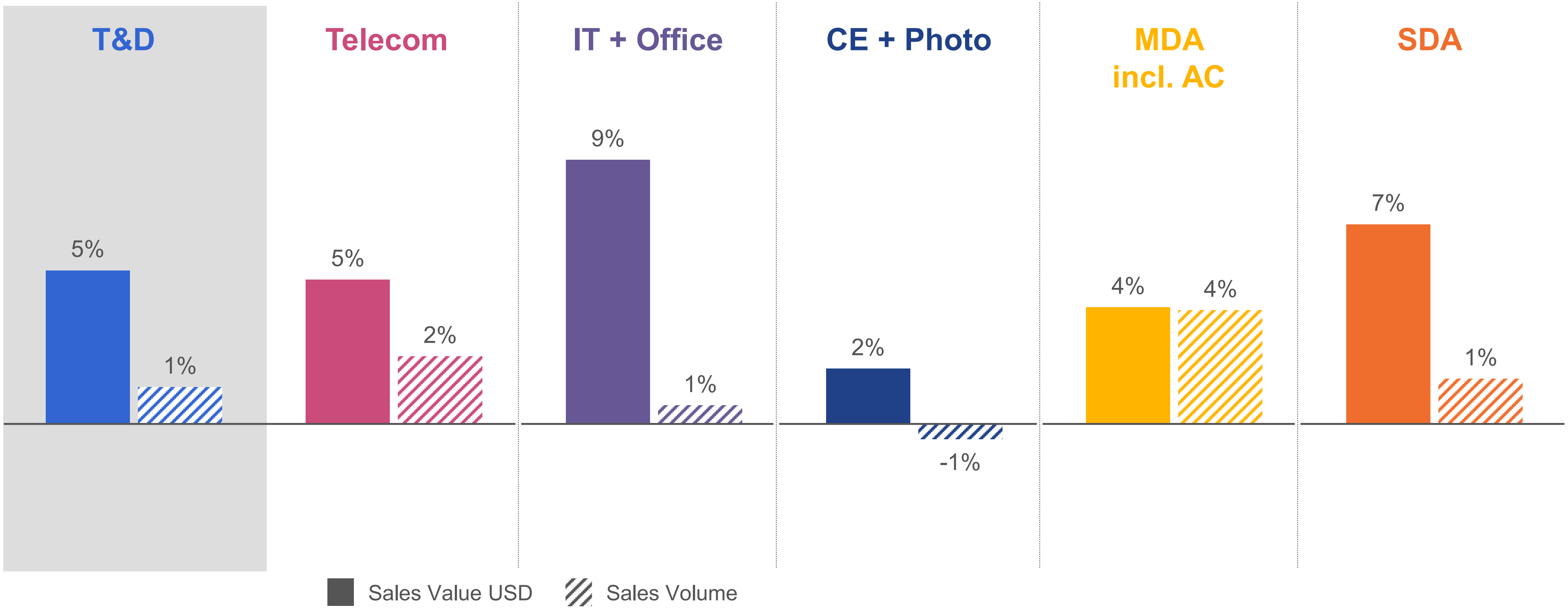
Value was back to growth ahead of volume. IT grew driven by replacement cycles. Telecom bounced back with new launches.

Sales value USD & volume growth % / YTD 2025



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World
Western Europe
Eastern Europe
Middle East, Turkey & Africa
APAC
Latin America

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All regions returned to growth. China slowed down due to fading subsidy effect.

Sales value USD value & growth / YTD 2025

Global (excl. NA/RU)

Value YTD	**$610bn**
Growth rate	**+5.0%**

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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

World
Western Europe
Eastern Europe
Middle East, Turkey & Africa
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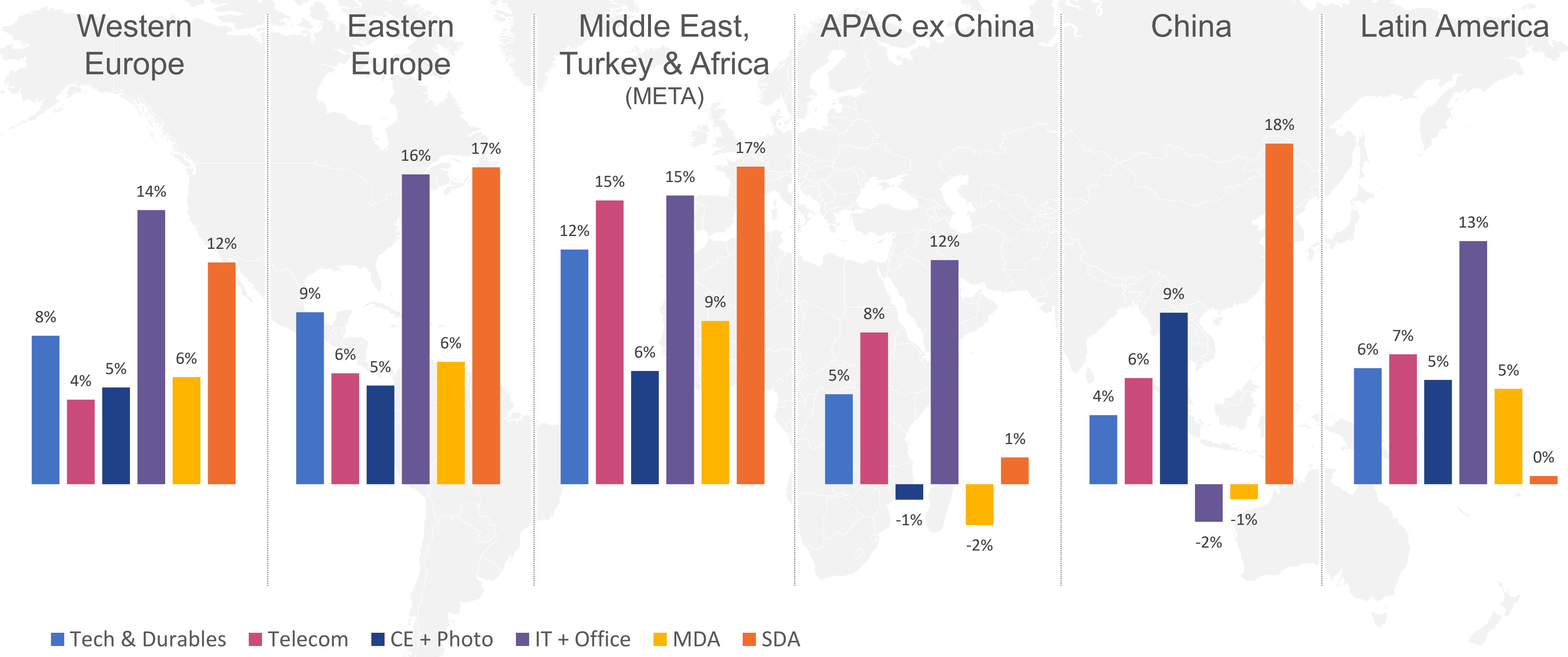
IT demand boomed due to replacement cycles. Telecom bounced back with new launches. SDA grew due to core category growth.

USD growth % YoY Q3/2025



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World
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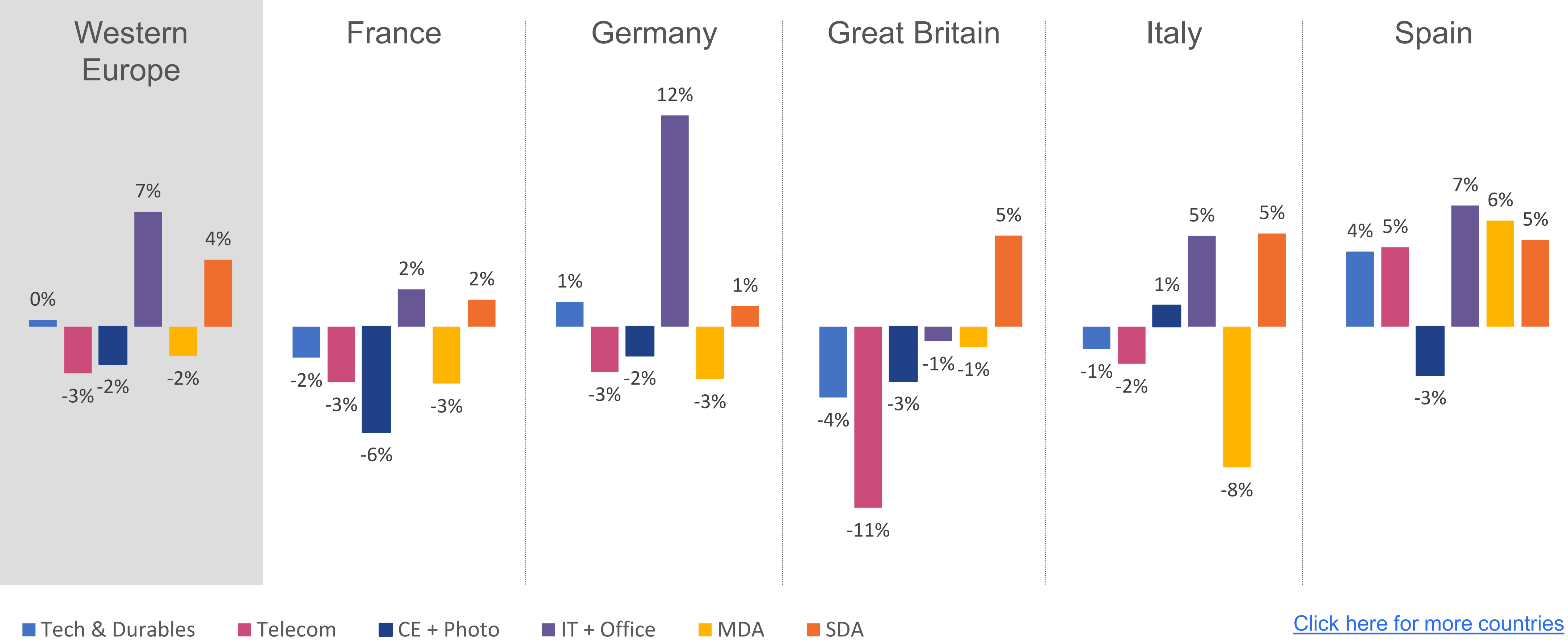
Resilient growth in SDA and IT amid sectoral challenges.

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

EUR growth % YoY Q3/2025



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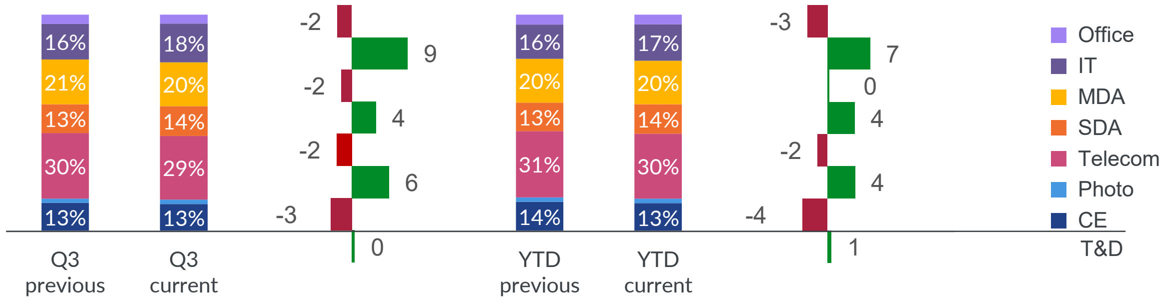
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | WEU: AT BE CH DE DK ES FI FR GR IT LX NL NO PT SE UK

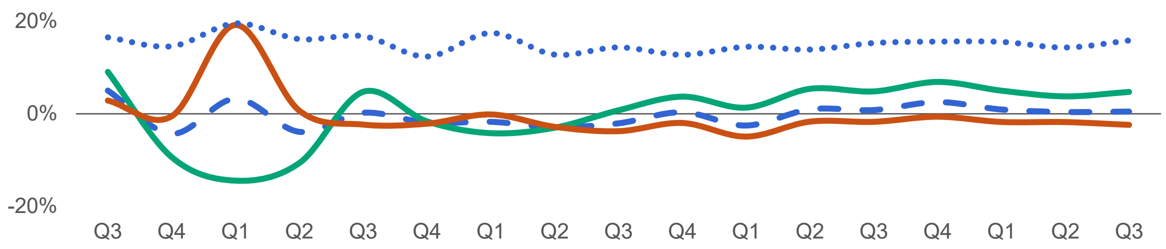
Helicopter View Western Europe

Western Europe
Contact person: **Erol Sukan** (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 Q3/2021)



Key Insights

- In Q3 2025, Western Europe's Tech & Durables market demonstrated a mixed but resilient performance, navigating sectoral challenges with pockets of growth and innovation.
- The overall market saw a modest year-to-date increase of +0.1%, driven primarily by strong momentum in IT and SDA.
- Within Q3 2025, IT stood out with a robust +9% growth vs Q3 2024, reflecting continued demand for computing and productivity solutions. SDA also performed well, growing +4%, likely supported by lifestyle shifts and consumer interest in convenience and health-oriented appliances.

Channel Dynamics

- Across Western Europe, online sales continued to grow steadily, maintaining their upward trajectory from previous quarters.
- In contrast, the traditional (offline) retail channel showed a slight decline, although its overall performance remained relatively stable.
- Whilst online remained the dominant growth engine, offline retail still played a vital role in specific markets and categories, especially where in-person service or product experience is valued.

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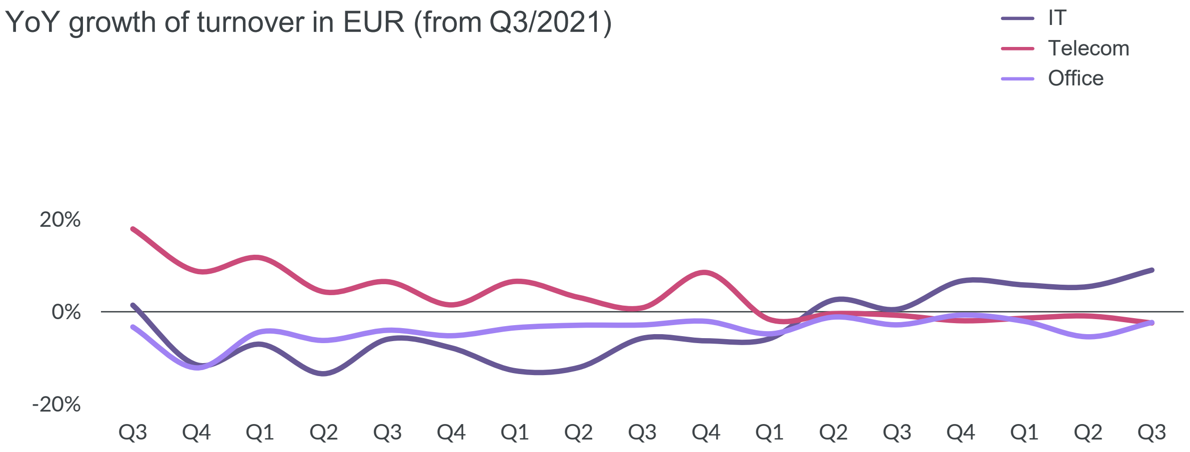
Helicopter View Western Europe

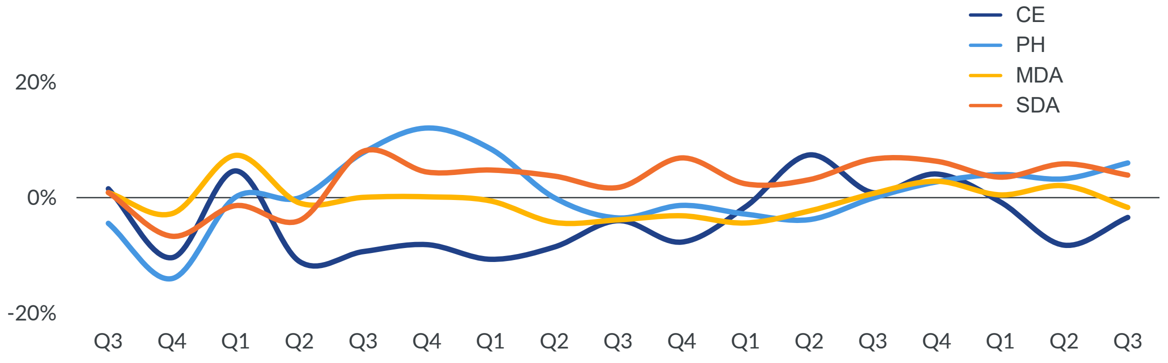
Western Europe

Contact person:
Erol Sukan
(MI Lead)

Erol.Sukan

YoY growth of turnover in EUR (from Q3/2021)





Growing & declining product segments

- IT was consistently the strongest growth driver across Western Europe. Consumers continued to upgrade and replace devices, with notable contributions from portable PCs, tablets, monitors, and storage solutions. Spain and Germany led the way!
- SDA maintained its position as a top performer, with growth across all major markets with categories such as air fryers, robot vacuum cleaners, coffee machines, and personal care devices.
- The photo category showed a healthy rebound, especially in Spain (+12%) and Great Britain (+9%).
- MDA faced challenges in some regions, but still posted growth in countries like Spain, supported by demand for cooling appliances and air conditioners. Premium features and new functionalities helped sustain interest.
- Consumer electronics continued to decline across most markets, impacted by post-event saturation following strong 2024 sales (e.g., EURO tournament and console launches).
- Telecom struggled overall. Spain was the exception, where operator-linked devices helped maintain growth.
- Office products faced widespread decline, bar Germany where Q3 2025 grew vs Q3 2024, but not quite enough to drive the YTD to positive territory.

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Italy
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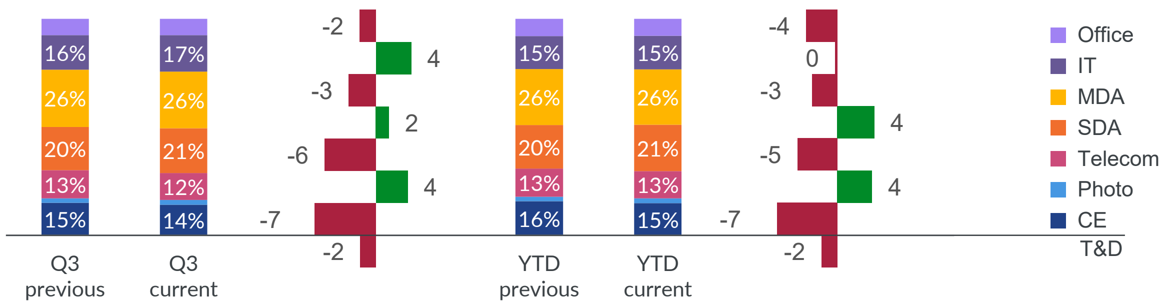
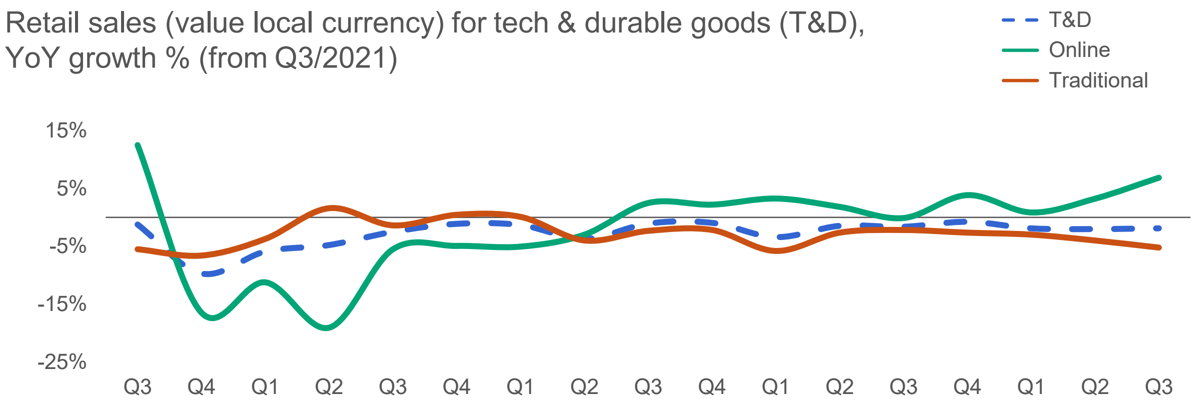
Helicopter View France

France
Contact person:
Pierre Geismar
(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 Q3/2021)



Key Insights

- Similar to Q2, the market continued to decline in Q3, dropping by 2%. CE, telecom, and MDA remained under pressure and were key contributors to this downturn.
- Conversely, IT recorded a positive trend for the first time in a long period, achieving 4% growth, primarily driven by the online channel. SDA continued to outperform.

Channel Dynamics

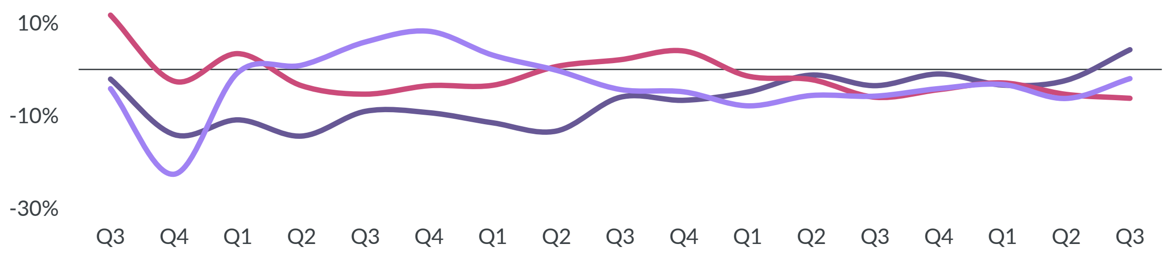
- Following an already positive Q2, the online channel performed even better in Q3, supported by an additional boost from IT. Strong results were recorded across all sectors, including CE, which had been in decline since the beginning of the year. However, these gains were insufficient to offset losses in the offline channel.
- While IT showed stable value offline compared to last year, the trend remained negative for all other sectors and even turned negative for SDA.

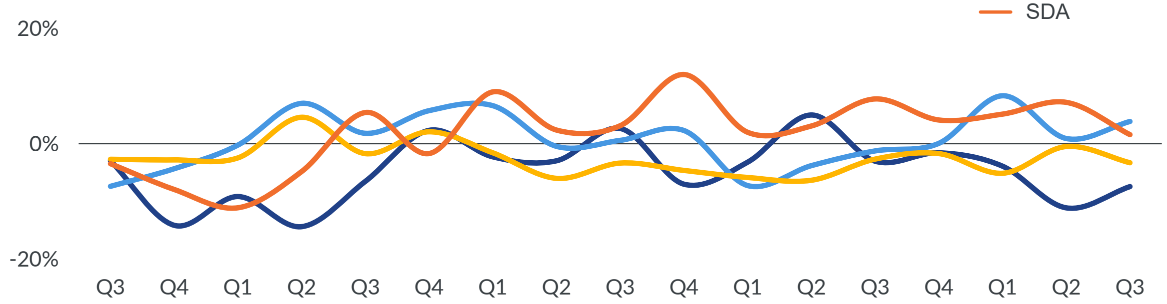
Source: GfK Market Intelligence: Sales Tracking, Panelmarket excl. SH/TCR, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View France

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- The SDA sector continued to grow, driven by vacuum cleaners and robots as always. For the first time in several years, hot air fryers slowed down and showed a flat performance in Q3.
- MDA struggled due to the difficult economic & housing situation. Consequently, the built-in/under segment was particularly impacted. Only cooling and air conditioners managed to find growth thanks to high temperature peaks.
- The IT market increased due to online channels. Portable PCs, media tablets, and monitors contributed to growth with declining prices. Overall, prices decreased in the IT sector.
- The OE sector managed to remain stable due to a significant growth of online channels, largely driven by increases of inkjet cartridges and MFDs.
- Smartphone sales declined since early 2025, but September was slightly more dynamic than last year due to new launches. Core wearables continued to grow steadily, driven by the health and fitness aspect.
- Despite a visible growth rebound of premium technologies like mini-LED, the PTV market followed its downward trend, while the photo market brought the quarter to a positive end, with growth of accessories (tripods), compacts/bridges cameras, and cameras for kids.

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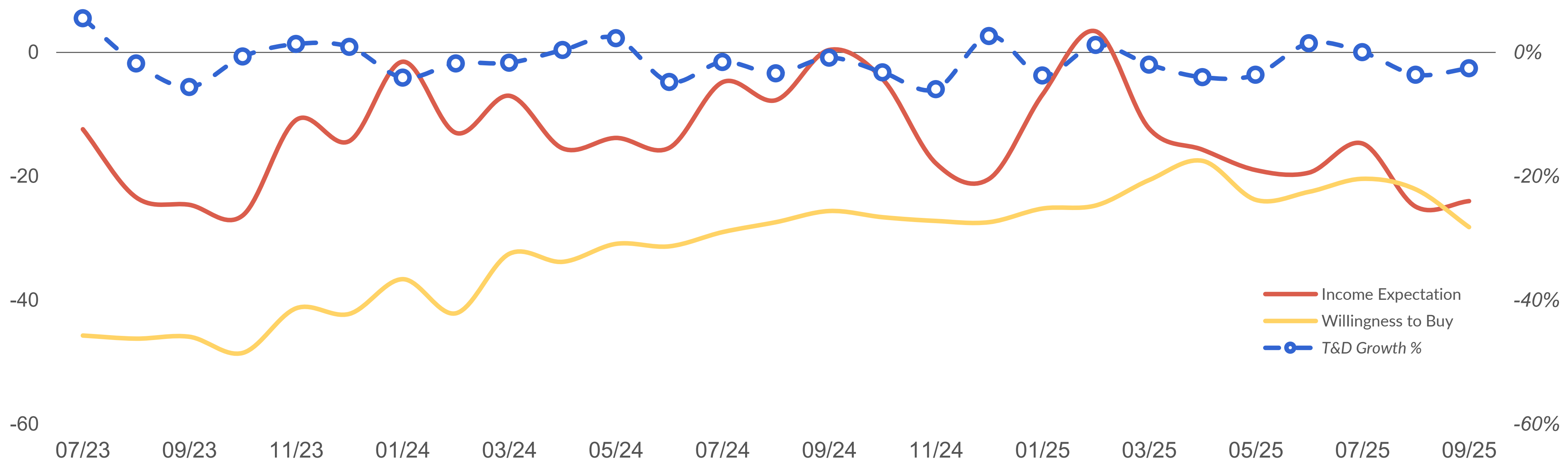
Source: GfK Market Intelligence: Sales Tracking, Panelmarket excl. SH/TCR, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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)



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.

- World
- Western Europe
- France
- Germany
- Great Britain
- Italy
- Spain
- Eastern Europe
- Middle East, Turkey & Africa
- APAC
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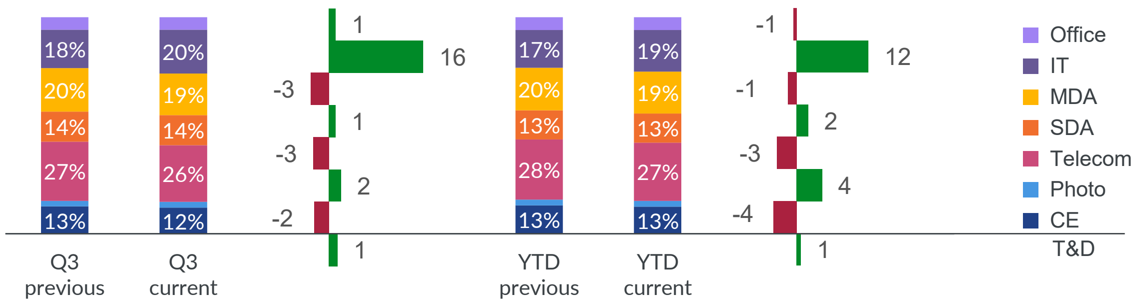
Helicopter View Germany

Germany

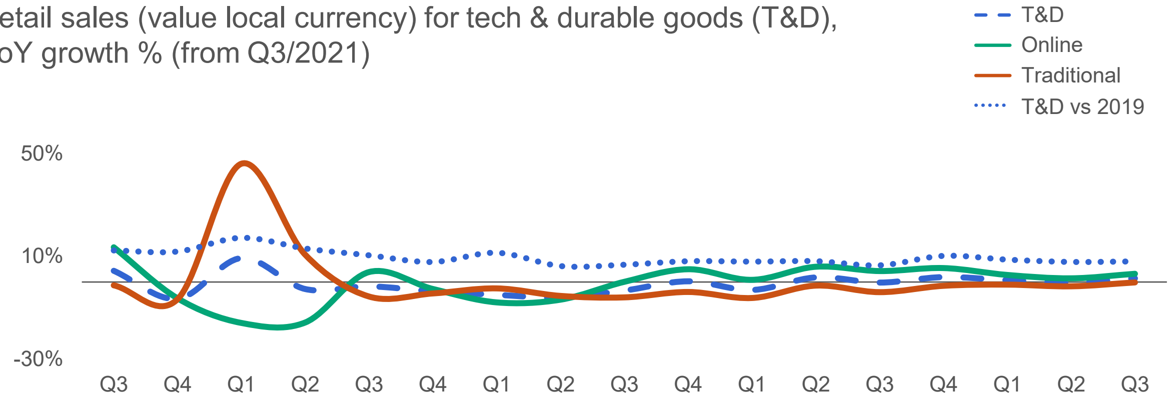
Contact person:
Alexander Dehmel
(MI Lead)

Alexander.Dehmel

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 Q3/2021)



Key Insights

- Q3 2025 continued to see a stable positive trend overall. July (+3% due to promotions) and September (+1%) gave positive impulses to the market. Thus, end consumer sales value remained positive in 2025 so far with +0.6%.
- Consumers turned to IT devices in Q3. The (now postponed) Windows 10 end support further accelerated the IT sector to grow in Q3 with +16% and thus even more than the year so far. Imaging, office, and SDA saw positive sell-out value in Q3, but apart from office at a lower level.
- MDA, after a positive Q2, turned negative in Q3. Also, telecom overall could not show a more positive momentum in Q3 and remained at -3% in 2025. Consumer electronics performed slightly better in Q3 vs YTD but remained negative (-2%).
- Everything is set for Q4, the most decisive quarter of the year for most T&D sectors. A slightly positive year end is expected.

Channel Dynamics

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

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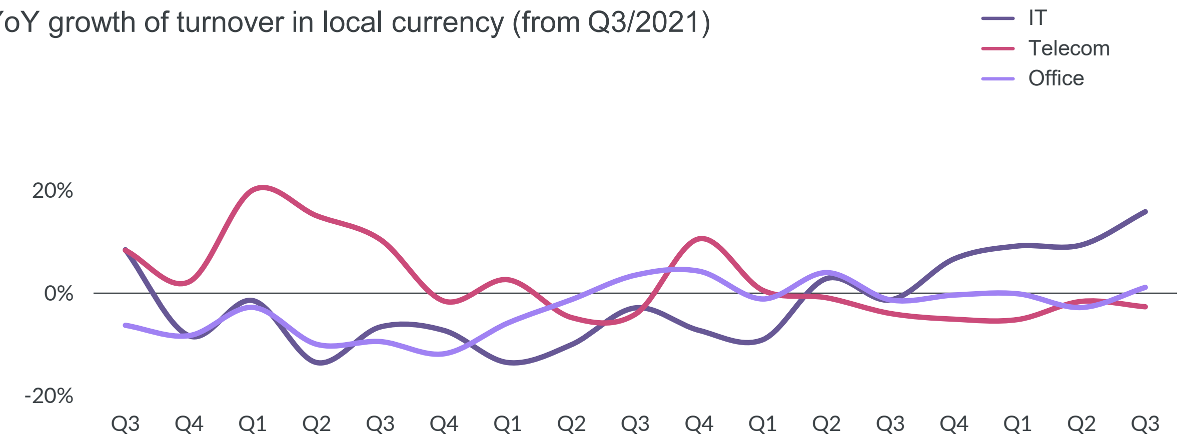
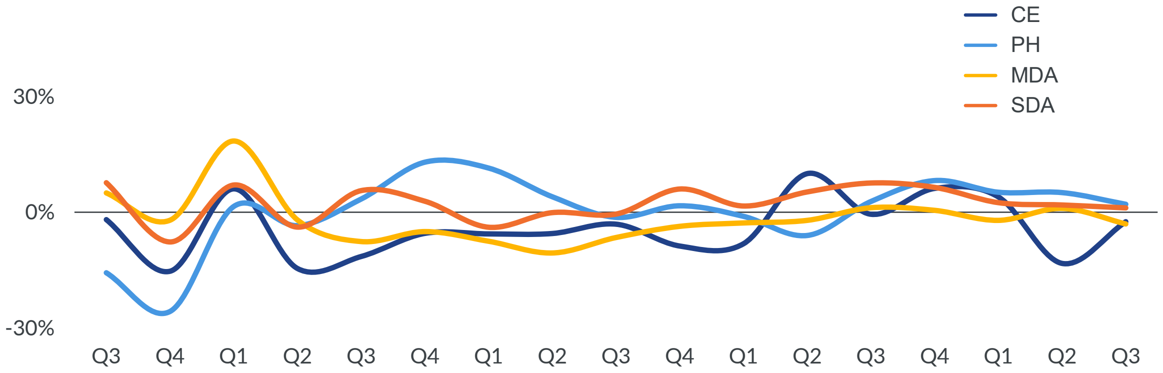
Helicopter View Germany

Germany
Contact person:
Alexander Dehmel
(MI Lead)
Alexander.Dehmel

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- Overall positive development in Q3 for the IT and office sectors: While IT performed extremely well with most major categories contributing to this growth, the office sector increased only slightly in revenue. Here, printing hardware further increased in turnover. Cartridges and the other categories showed a mixed picture.
- The telecom sector declined in Q3 2025, driven by most categories (incl. smartphones). Only mobile accessories grew YoY, driven by chargers.
- The downturn in the CE sector continued in Q3, with hardly any product group showing a positive trend – neither in vision nor in audio.
- The MDA market continued to face challenges in Q3 2025, with revenue declining compared to last year across nearly all product groups. Slight growth was recorded only for built-in hobs, driven by offline channels. Compared to the previous quarter, the market showed a positive trend, reflecting a modest improvement.
- SDA continued to show positive results in Q3 2025, but the growth rate was on a rather low level. Full-automatic espresso machines and handstick rechargeable vacuum cleaners declined in value whereas air fryers, robots, pump traditional coffee machines, and liquidizers made significant positive contribution.

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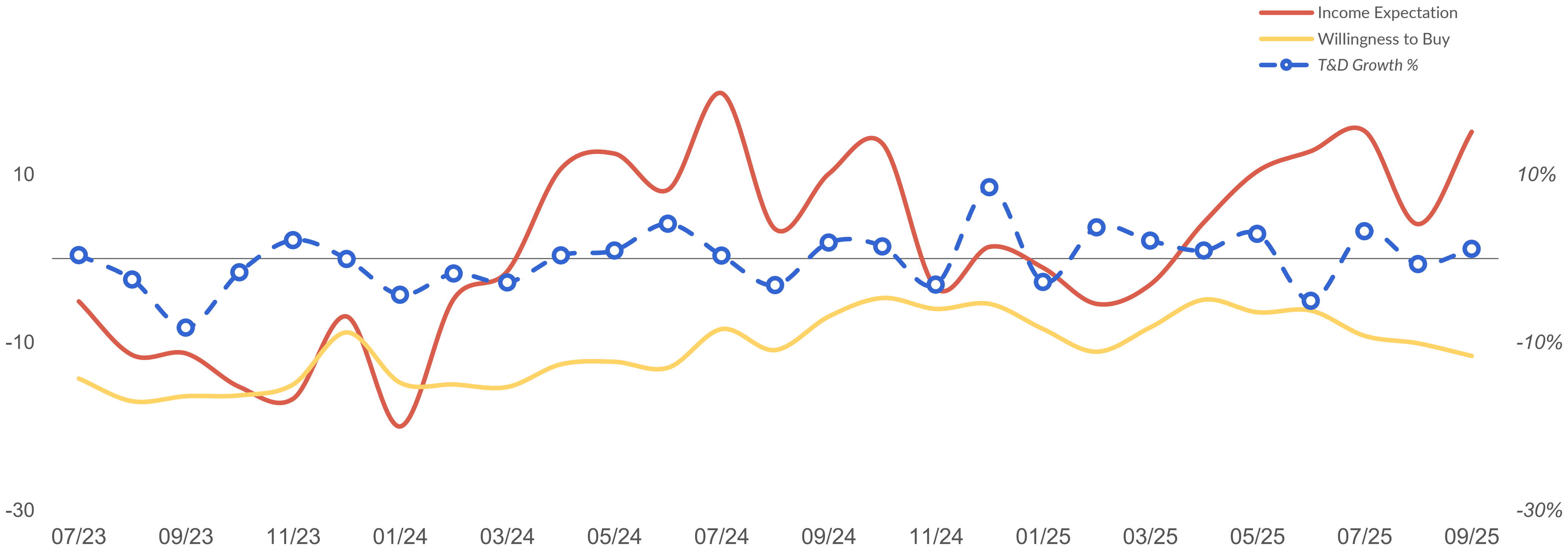
Spotlight on NIQ Consumer Climate and T&D in Germany

Germany
Contact person:
Alexander Dehmel
(MI Lead)
Alexander.Dehmel

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



NIQ Consumer Climate – Reading example

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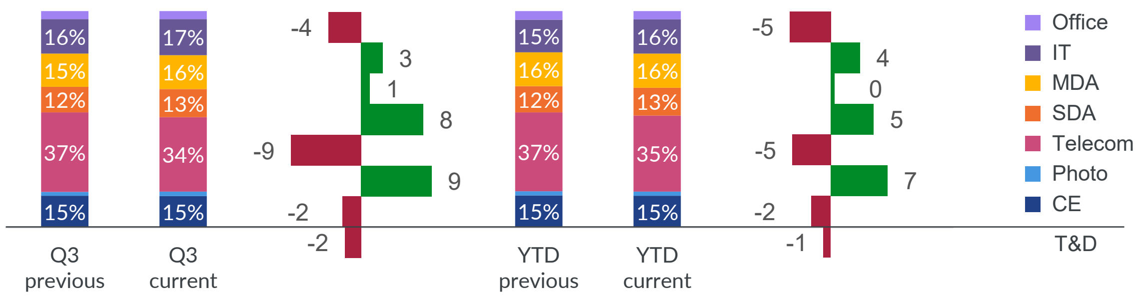
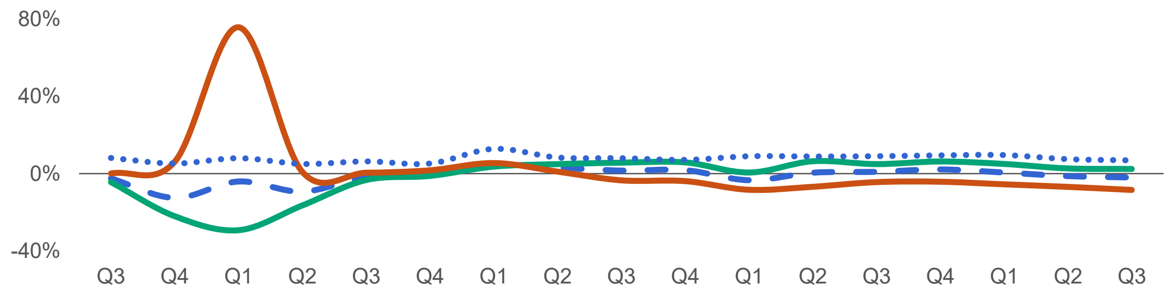
Helicopter View Great Britain

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 Q3/2021)



Key Insights

- This quarter, T&D markets declined, despite signs of optimism and growth in a number of categories.
- In the UK, we have hit the COVID replacement cycles for several product groups which boosted the performance of categories such as computing and MDA.
- Rising food prices continued to push up cost of grocery shopping and eating out, which left less money for consumers to invest in the T&D market.
- Consumers continued to buy for their needs of the moment. The weather and special occasions/events were prime triggers to spend with less caution, meaning, considered purchasing now is the norm.

Channel Dynamics

- Online channels continued to grow as more stores closed, meaning that 55% of sales within T&D go through online now.
- The consolidation of the retail landscape continued to push shoppers to online. However, stores are still important for specialist products.

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Helicopter View Great Britain

Great Britain
Contact person:
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(Retail T&D CS Lead)
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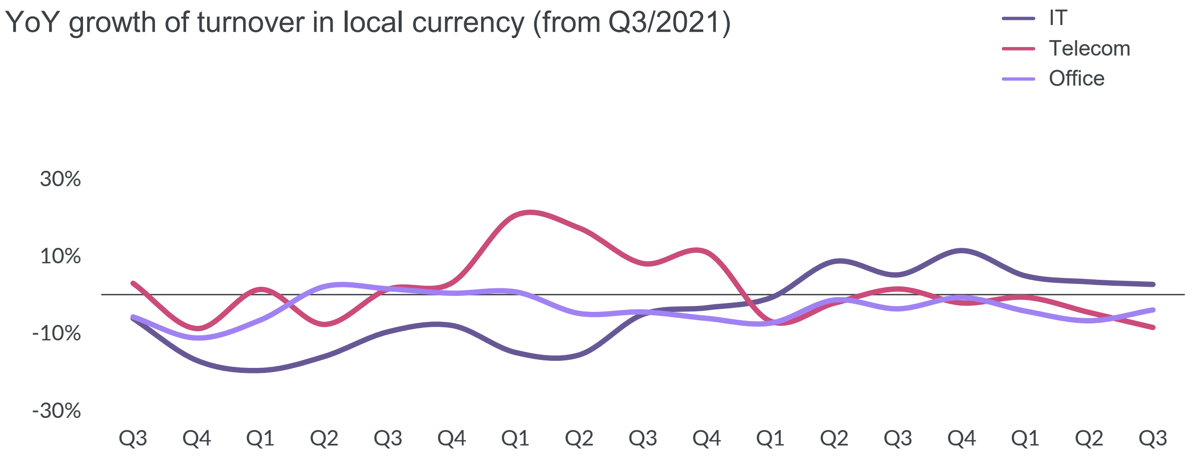
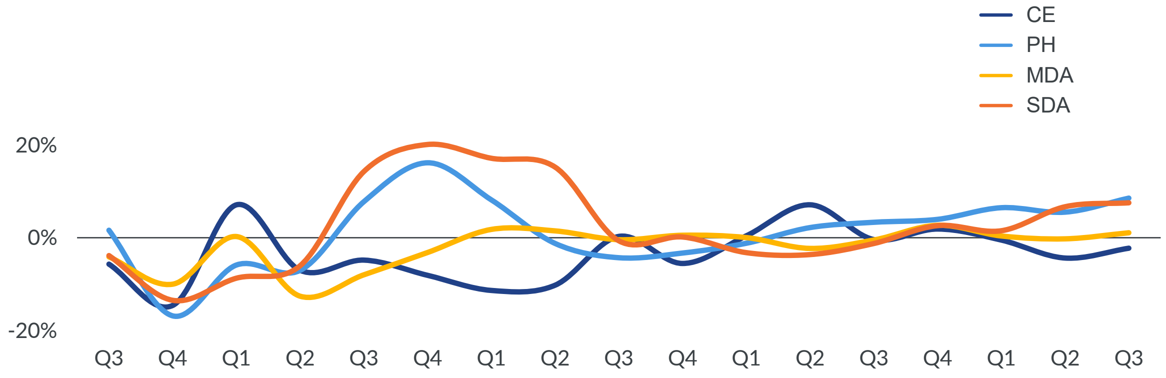
YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- While the T&D market saw a flat performance, there are reasons to be optimistic, with pockets of growth coming from IT, SDA, and the photo sector. We expect to see CE and MDA start to pick up in 2026 as replacement cycles for these products are likely to start next year.
- Underlying trends of performance, health, and sustainability continued to prevail. Convenience is key, not just in terms of products that simplify lives, but the whole shopping experience.
- IT/computing, SDA, and photo all saw strong growth, thanks to COVID replacement cycles kicking in, and new products in these sectors.
- CE remained a challenging area with sales still contracting, not helped by strong sales in 2024 thanks to the EURO soccer tournament, as well as huge games console launches last year.
- The last 6 months saw a really strong performance for SDA, across kitchen, personal care, and home comfort. Coffee machines was the biggest driver within kitchen appliances. Electric cosmetics boosted the personal care market with over 200% growth, and home comfort saw growth across all areas.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, 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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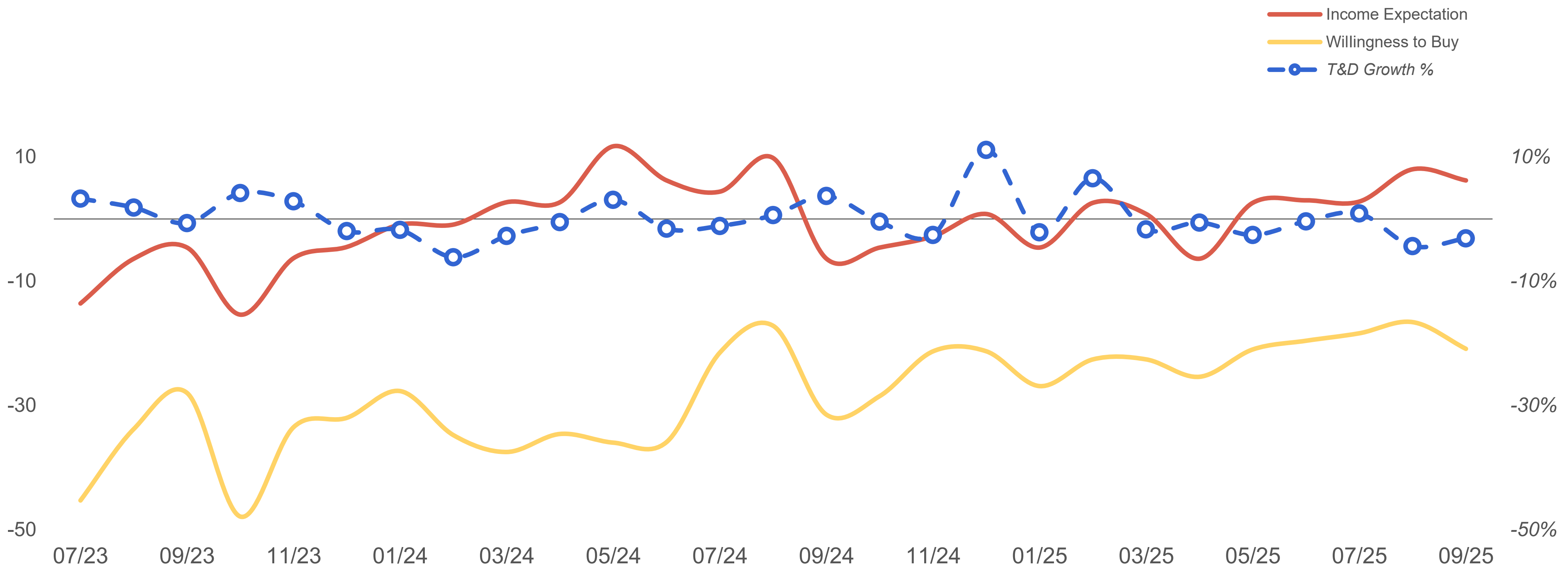

NIQ Consumer Confidence Barometer – Reading example

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.

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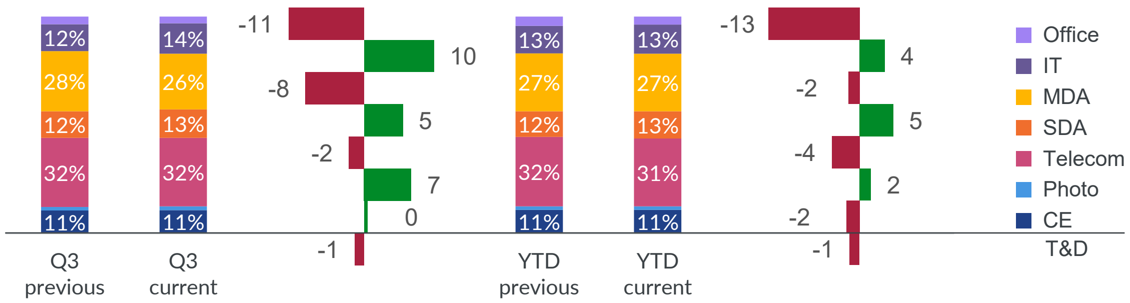
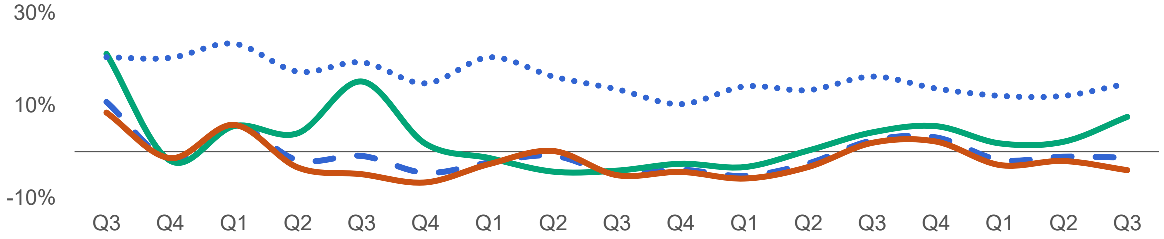
Helicopter View Italy

Italy
Contact person: **Martina Resnati** (MI Retail)
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 Q3/2021)



Key Insights

- In Q3 2025, the Italian Tech & Durables market registered a -1% decrease in terms of value compared to Q3 2024.
- The only positive sectors were CE, photo, SDA, and IT which registered +1%, +6%, +13% and +10%, respectively.
- By contrast, the other sectors performed negatively: telecom, MDA, and office (-2%, -4% and -11%, respectively).

Channel Dynamics

- In Q3 2025, online sales continued their positive trend, increasing by +7% compared to the same quarter of the previous year.
- Conversely, traditional sales had a negative impact within the Tech & Durables market, posting decline of 4%, decreasing the already negative performance registered in previous quarters and opposite to the positive performance at the end of 2024.

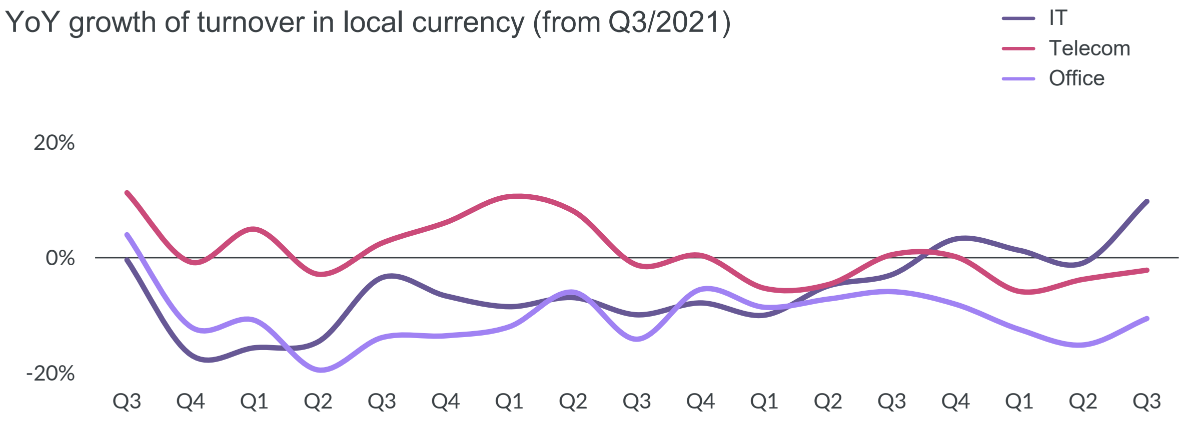
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

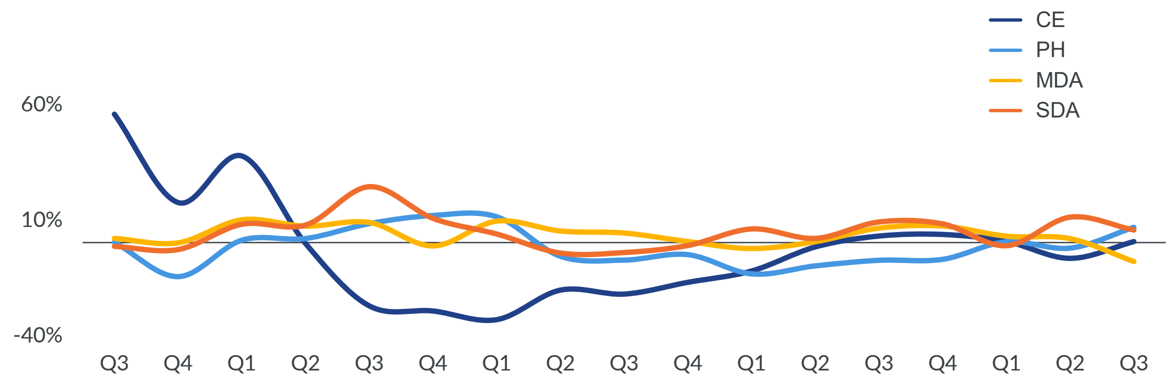
World
Western Europe
France
Germany
Great Britain
Italy
Spain
Eastern Europe
Middle East, Turkey & Africa
APAC
Latin America
PREV NEXT

Helicopter View Italy

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- IT registered a very positive trend (+10%) thanks to the good performance of its main product groups, mobile computing (+9%), tablets (+11%), gaming & leisure devices (+8%), and desk computing (+6%).
- CE showed a similar scenario. The positive trend (+1%) after a long period of decreases was strongly related to the recovering of PTV, being flat in Q3, and the increase of mini-Bluetooth speakers (+7%), loudspeakers (+16%), AV mounting solutions (+7%), and audio home systems (+3%).
- SDA registered a positive trend (+13%), essentially due to the good performance of hot beverage makers (+27%), vacuum cleaners (+9%), irons (+4%), shavers (+5%), and dental care (+9%). Conversely, soda makers delivered a negative trend (-2%).
- The negative performance of telecom was driven by smartphones (-2%), mobile phones (-25%), and telephone devices (-7%). The positive development of core wearables (+4%) and mobile enhancements (+!5) was not enough to recover the whole sector.
- After a positive quarter, major domestic appliances were unable to sustain their previous performance across all categories, except for dishwashers, which remained flat. The same for office, where cartridges, MFDs, and printers influenced the negative trend of the sector.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

World

Western Europe

France

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Spain

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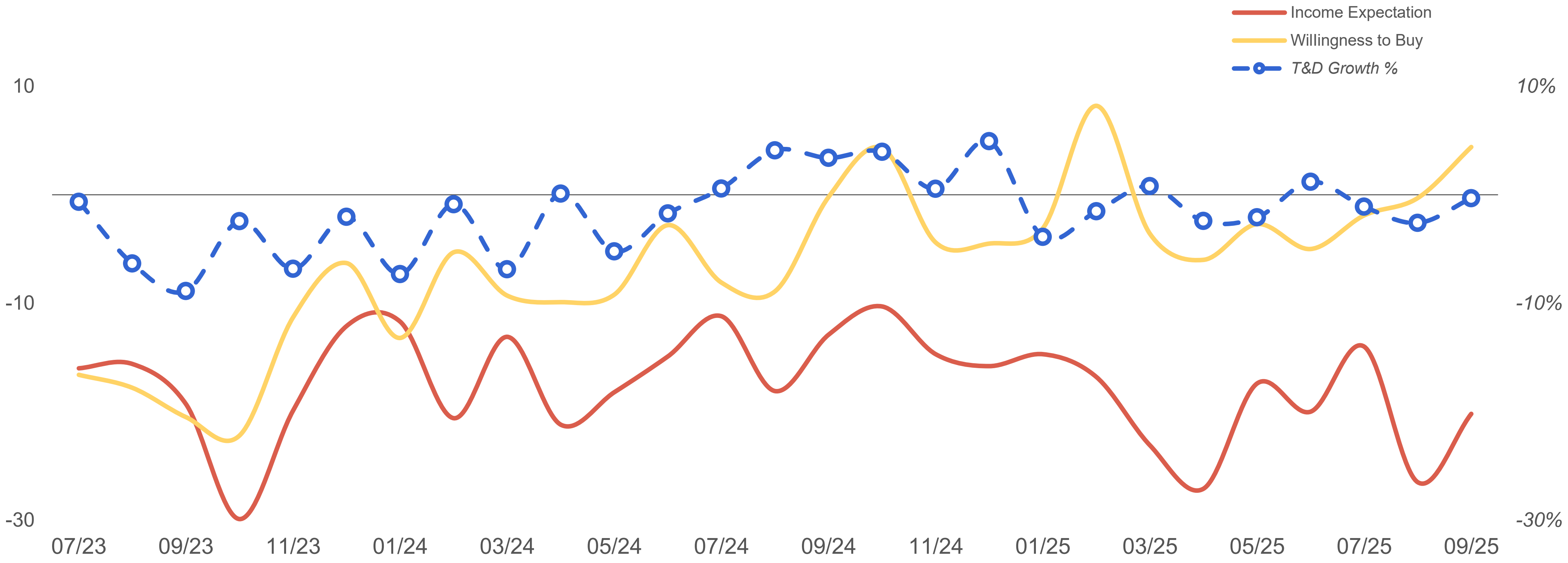
Spotlight on NIQ Consumer Climate and T&D in Italy

Italy

Contact person:
Martina Resnati
(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.

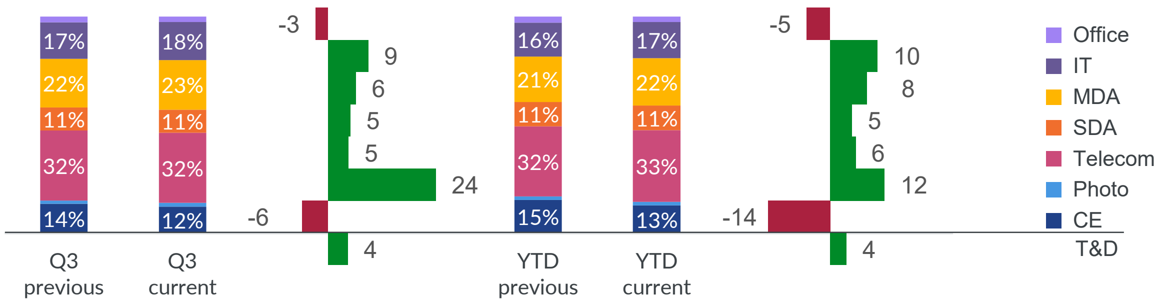
Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand.

powered by GfK intelligence

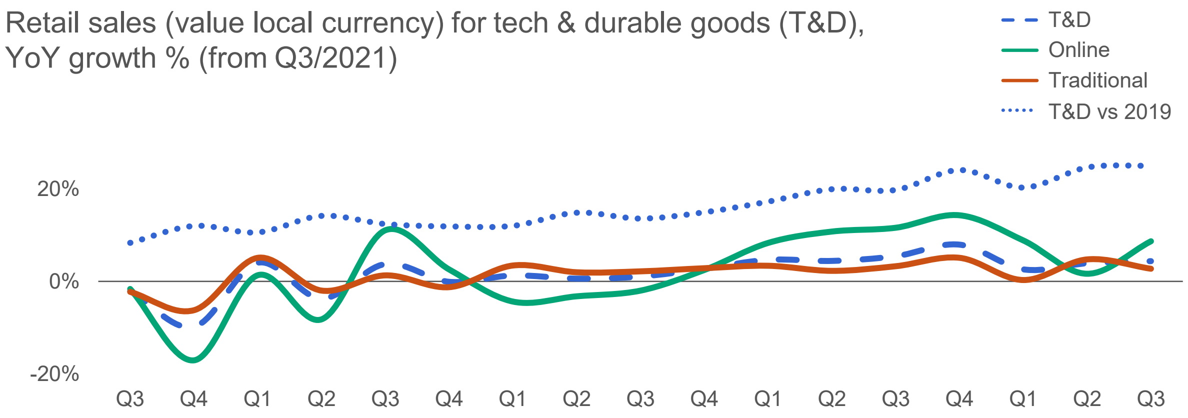
Helicopter View Spain

Spain
Contact person:
Elena Toribio
(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 Q3/2021)



Key Insights

- The T&D market was in good health in Q3. Only office and CE did not exceed their turnover as seen in 2024. As in the previous quarter, the decline in the CE sector caused by the switch-off of SD channels in 2024 continued to ease, as the main sales peak occurred in the first half of the year. The office sector showed a softer decline than in previous months, too.
- In terms of growth, the best performing sector was photo, although the small size of this market meant it contributed little to the overall increase. It was the IT sector which drove growth the most.
- Telecom remained the largest sector in terms of value. However, during Q3, sales of SIM-free smartphones declined, while the other categories were what kept the market in positive territory.

Channel Dynamics

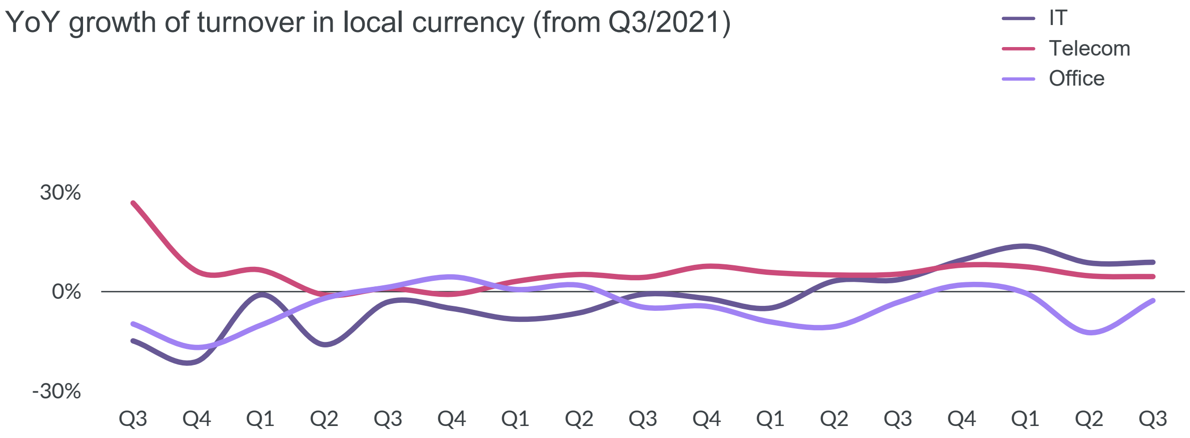
- Online sales represented 32% of total sales in the third quarter, which is 1.5 points of weight higher than last year.
- In-store sales results were not as strong. We even saw a decline in offline sales in August, the month when online performed best.
- The only sector which did not perform well online was Telecom. Here, instore sales grew.

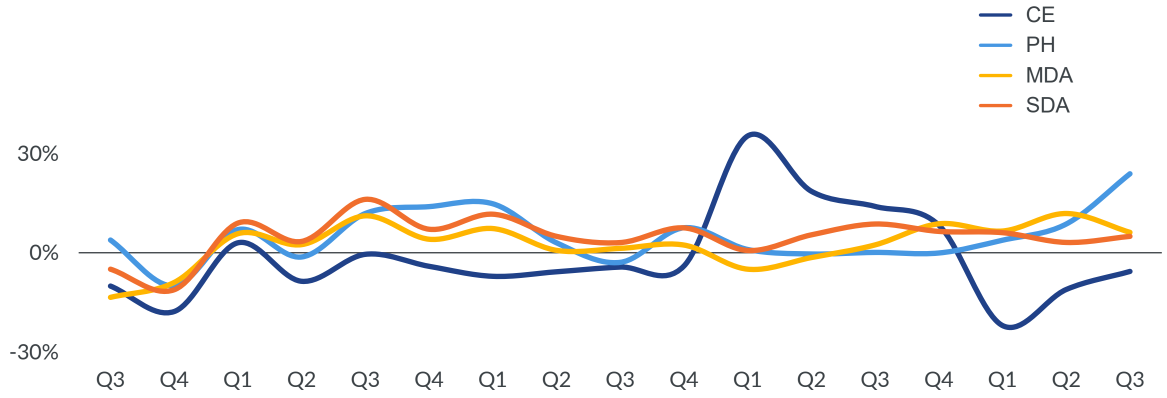
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Spain

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- The three months that make up the quarter showed growth, but month by month, this trend gradually weakened.
- IT was the best contributing sector. Not only PCs were in good health, but as well monitors, peripherals, storage, etc., indicating replacement of devices purchased during the pandemic.
- SDA generally performed well. The premium segment (automatic coffee machines, vacuum cleaners, stylers, etc.) showed strong performance. Even in declining categories like air fryers, we saw growth in specific niches, such as models with multiple baskets.
- Although the TV market did not grow, the decline no longer exceeded double digits as it did previously, and big screens (>75") or the QLED technology experienced growth.
- The dynamic real estate market helped boost appliance sales. All categories grew, without exception. Again, premium products or new functionalities in appliances performed better.
- Smartphone sales showed a contrasting trend between SIM-free and operator-linked devices. Revenue from contract-bound terminals increased, whereas SIM-free models declined. Meanwhile, headphones, wearables, and other accessories continued to perform positively.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

PREV NEXT

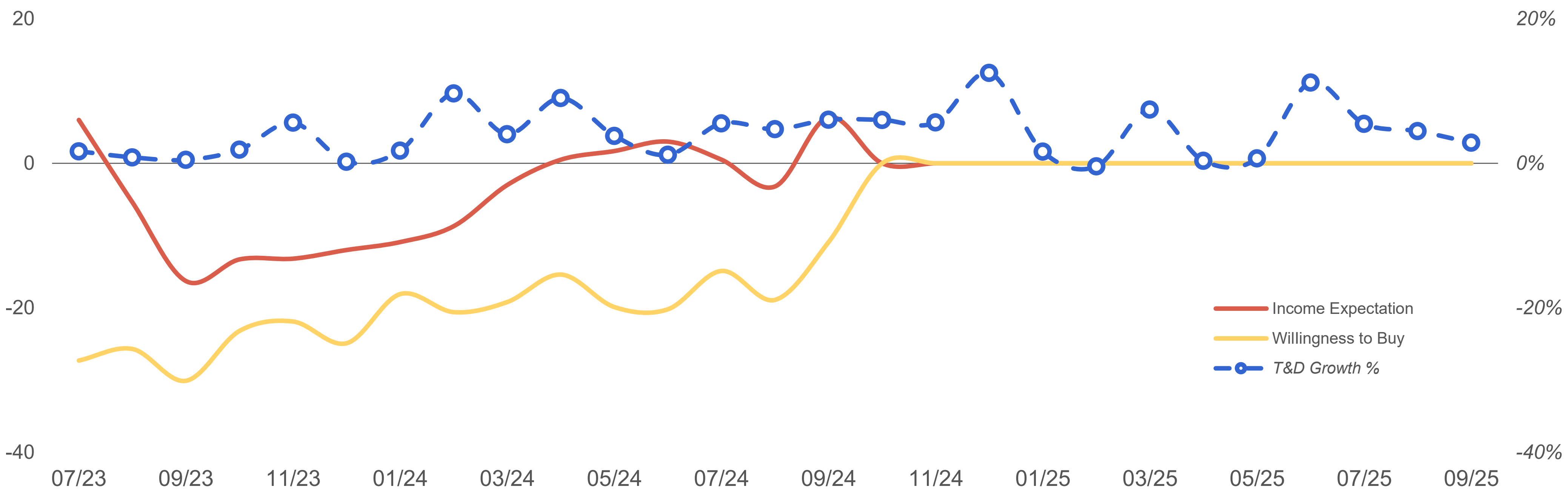
Spotlight on GfK Consumer Climate and T&D in Spain

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.

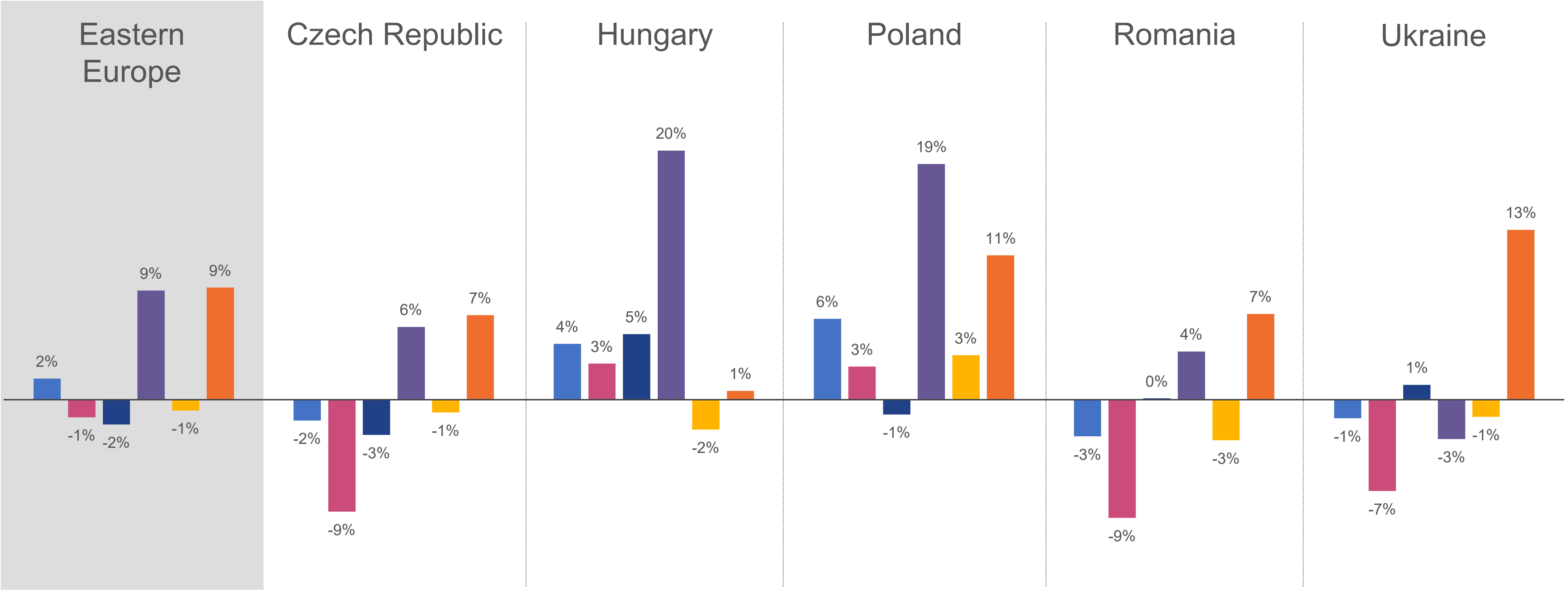
Source: GfK Consumer Climate - powered by NIM, cofunded by EU Commission. Seasonally adjusted and globally standardised index, based on balance of positive against negative responses to questions on income expectation and willing to buy. Full methodology details available upon demand. ES: Due to the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

World
Western Europe
Eastern Europe
Czech Republic
Hungary
Poland
Romania
Ukraine
Middle East, Turkey & Africa
APAC
Latin America
PREV NEXT

Resilience amid economic headwinds – SDA & IT drove momentum.

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

EUR growth % YoY Q3/2025



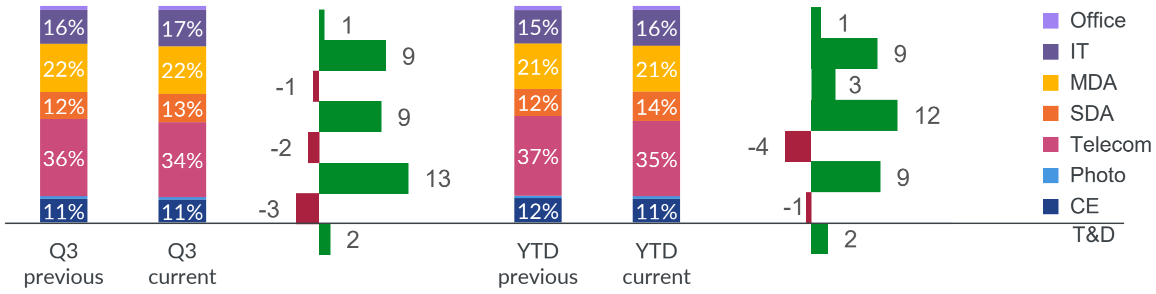
Click here for more countries

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q3/2025 vs Q3/2024, 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 |

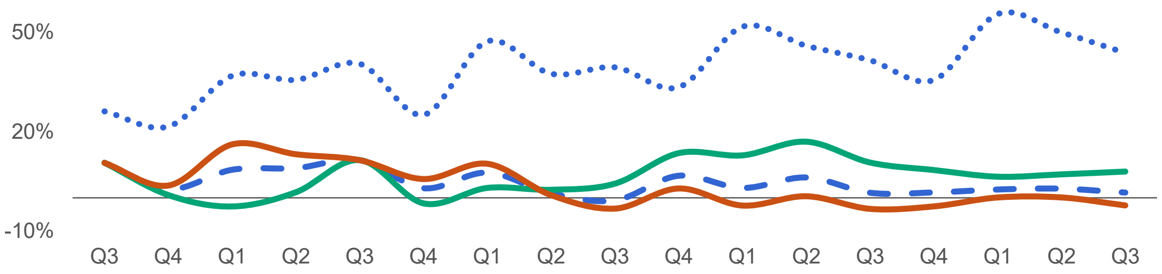
Helicopter View Eastern Europe

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

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 Q3/2021)



Key Insights

- Despite ongoing economic challenges and uncertainties, including concerns over a potential trade war, the Central European Tech & Durables market grew by 2% in Q3 2025. Poland emerged as the primary driver of this growth.
- Hungary displayed a distinct market profile. Growth in this country was modest, with increases largely concentrated in the IT and office product categories.
- The main growth engines were SDA, led by kitchen equipment, health devices, and personal care appliances. This trend was particularly strong in Ukraine (+26%), Romania (+14%), and Poland (+12%).
- A notable decline was observed across all markets in the telecom sector, especially in smartphone sales, which significantly impacted overall market growth.

Channel Dynamics

- E-commerce continued its upward trajectory. From Q1 2021 to Q3 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 Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office |
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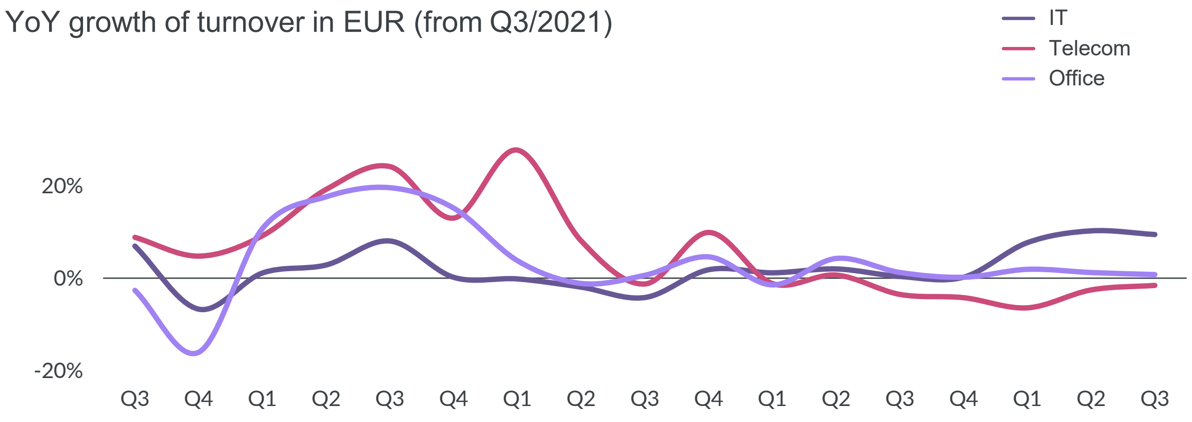
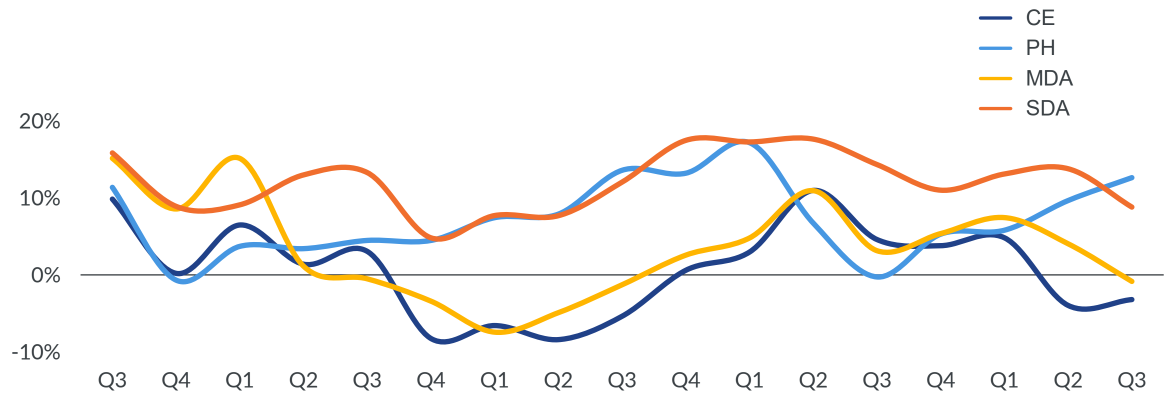
Helicopter View Eastern Europe

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

YoY growth of turnover in EUR (from Q3/2021)





Growing & declining product segments

- Hungary shows the largest absolute gains (YoY), particularly in telecom (phablets) with +16,904 million HUF (+6%) and IT/gaming hardware (+16,720 million HUF, +17%). Mobile computing alone surged by +7,659 million HUF (+17%), confirming Hungary as the region's tech growth engine.
- Electric fryers were the standout product group (YoY) in Ukraine (+222%), Poland (+97%), and Czech Republic (+63%). This trend suggests a pan-regional appetite for quick-cooking solutions, likely linked to urbanization and changing eating habits.
- Hungary (+59% YoY) and Czech Republic (+45% YoY) saw sharp increases in desk computing, reversing prior declines. This may reflect hybrid work stabilization and enterprise refresh cycles, creating opportunities for PC vendors and accessories.
- Poland's IT/gaming hardware rose +7%, driven by mobile computing (+20%) and monitors (+7%), while consumer electronics slightly declined (-1%). This shift underscores a migration from entertainment hardware toward productivity and gaming setups.

PREV
NEXT

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), EUR value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office |
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World

Western Europe

Eastern Europe

Czech Republic

Hungary

Poland

Romania

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Middle East, Turkey & Africa

APAC

Latin America

PREV NEXT

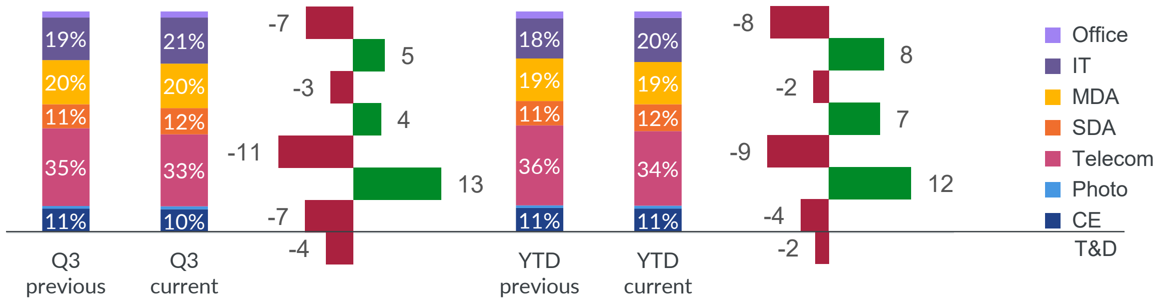
Helicopter View Czech Republic

Czech Republic

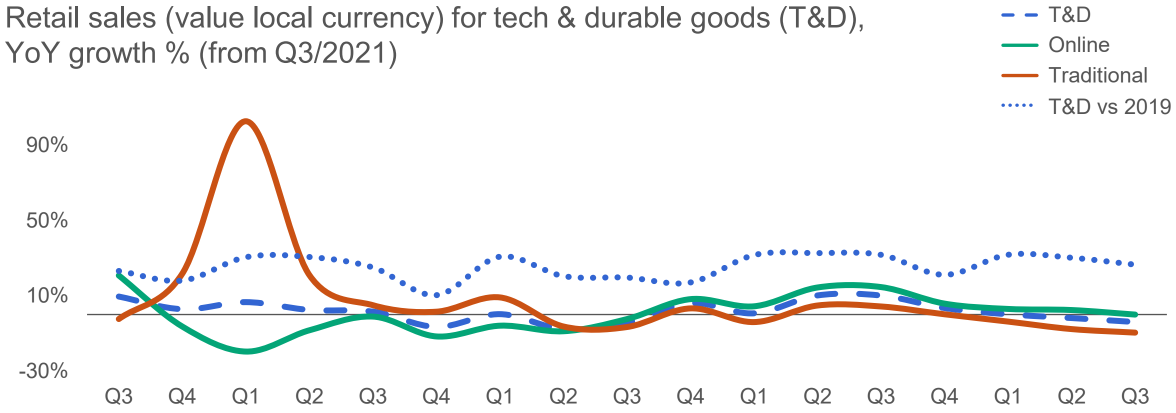
Contact person: **Zdenek Barta** (MI Lead)

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 Q3/2021)



Key Insights

- Year-on-year demand in the MDA sector declined slightly, with ongoing price erosion.
- CE sales continued to fall in Q3. The decline in the key category PTV Flat is mainly attributed to the slowing consumer demand for middle and small screens and due to price erosion.
- The telecom sector declined despite slight growth of average prices.
- The SDA sector experienced some slowdown in Q3, but year-on-year there was a strong positive trend.

Channel Dynamics

- Online sales served as the primary growth engine in all sectors, amid a continued downturn in the traditional market.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

World
Western Europe
Eastern Europe
Czech Republic
Hungary
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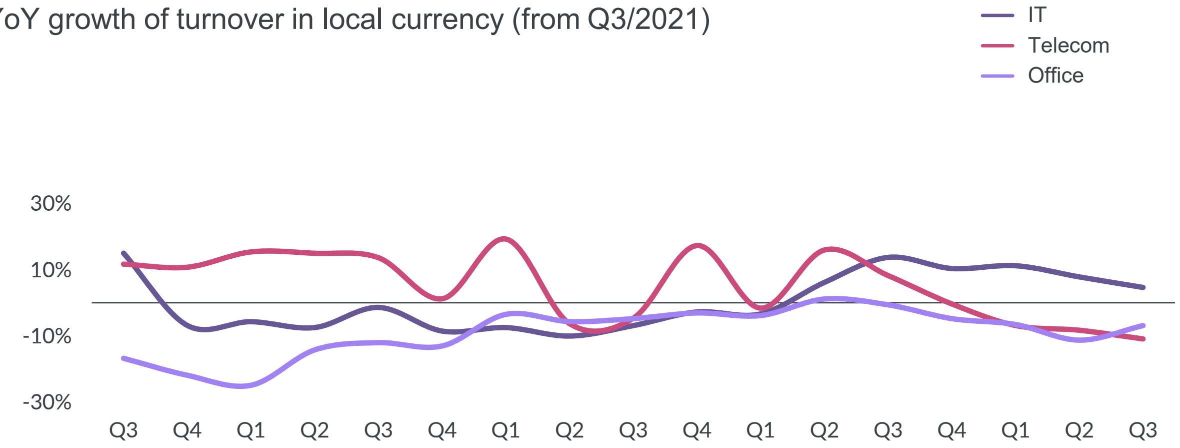
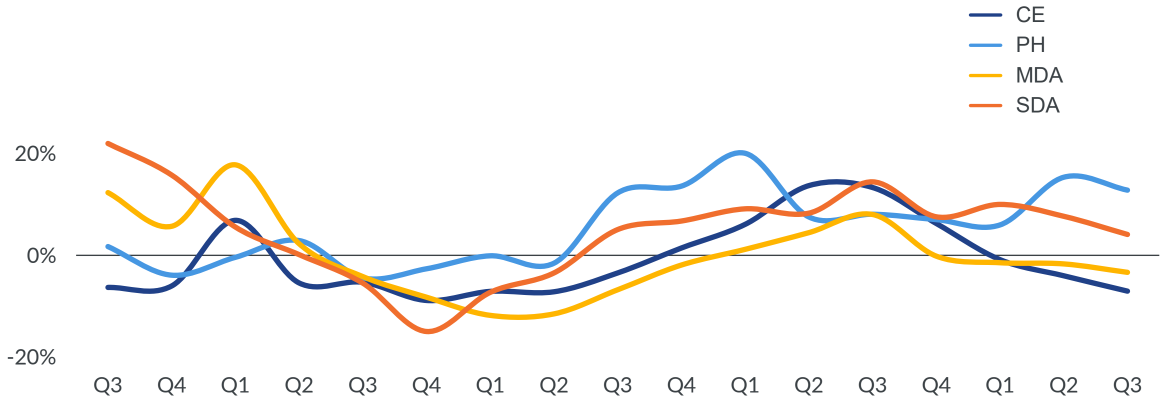
PREV NEXT

Helicopter View Czech Republic

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

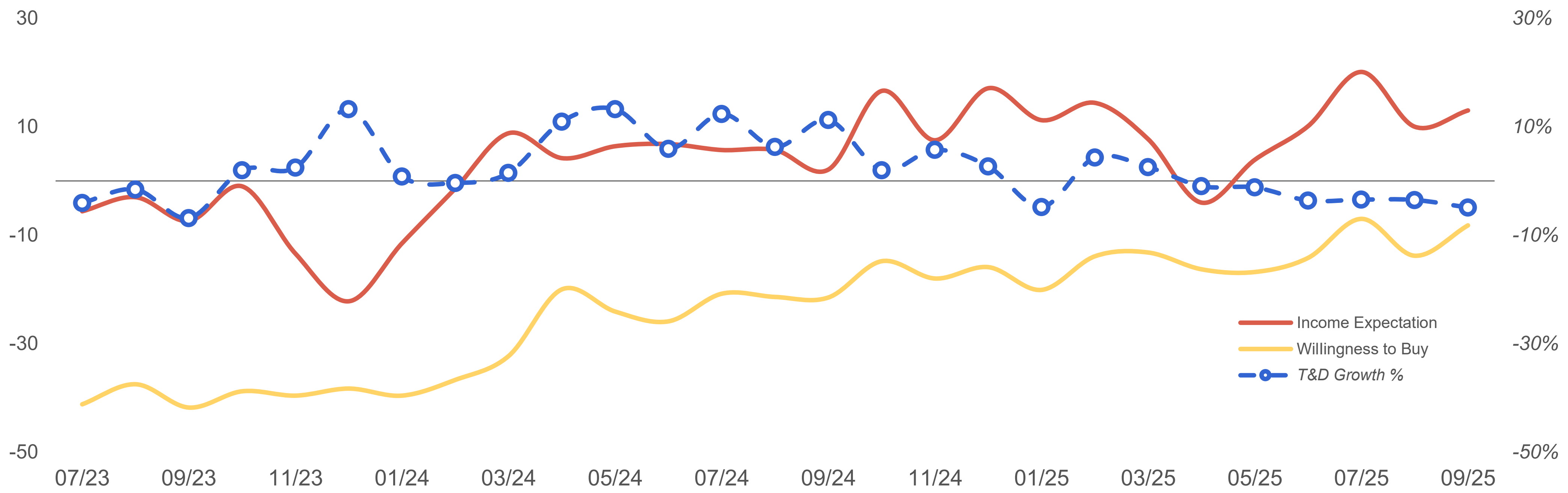
- The introduction of new energy labels triggered significant market renewal and strong momentum in the dryer category.
- Fryers and vacuum cleaners were the key value drivers within SDA. Dental care and hair dryers/stylers showed very good growth, too.
- The office sector experienced a year-on-year drop of sales value, driven by both laser and inkjet printing devices. The sharper decline in laser segment was amplified by the price erosion.
- The photo sector showed double-digit revenue growth, driven by the demand for fixed lens cameras in the segments large sensor and travel zoom but also for entry-level system cameras.
- Mobile computers grew moderately on price gains, while non-gaming premium models (€700+) posted double-digit growth on strong unit sales.
- Media tablets fell by 10% due to the negative price development, except the 11–12" segment, which more than doubled in volume.
- The drop of the telecom sector was driven by smartphones with storage <128GB, while 512GB+ and 6.8"+ display segments surged.
- Smartwatches' revenues edged up YoY thanks to higher volumes of non-SIM/eSIM models.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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

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

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



PREV NEXT

GfK Consumer Climate – Reading example

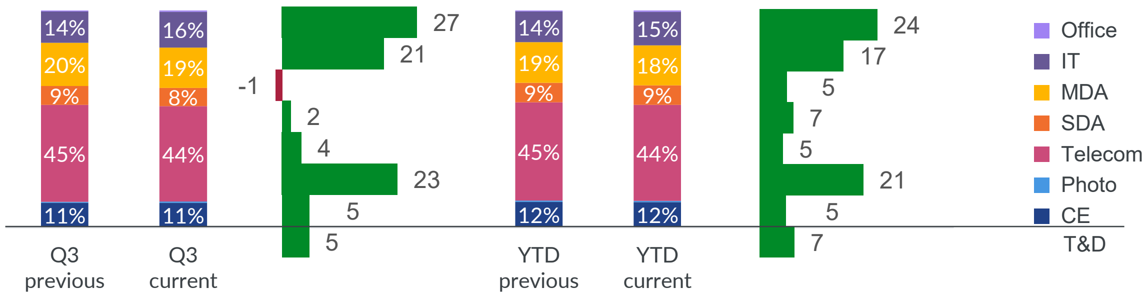
If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

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.

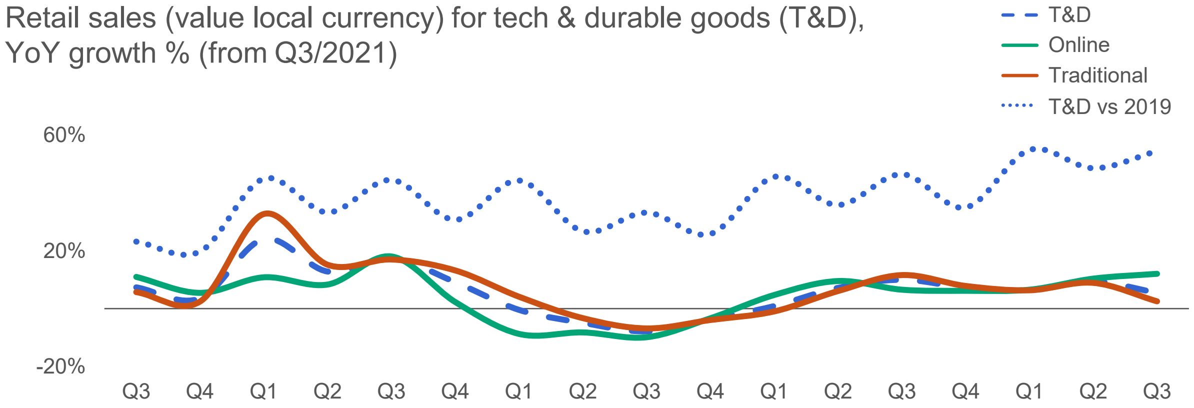
Helicopter View Hungary

Hungary
Contact person:
Andrea Sztupár
(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 Q3/2021)



Key Insights

- With growth of 5% in Q3, the Hungarian T&D market could exceed last year's performance. The main driver of this growth were the IT and office sectors, where the sales in this quarter had remarkable growth compared to the same period last year.
- The telecom sector, which has the biggest share among the T&D sectors, could increase by only 4% in Q3. Home appliances showed stagnation compared to Q3 2024.

Channel Dynamics

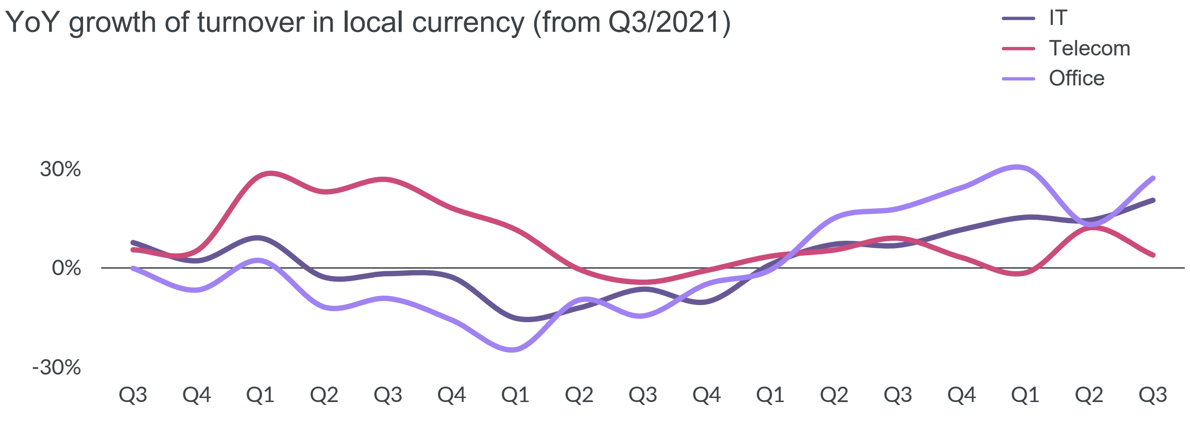
- In Q3. online sales outperformed offline sales dynamics, and the reason behind were the IT and OE sectors, as these products are sold online preferably.

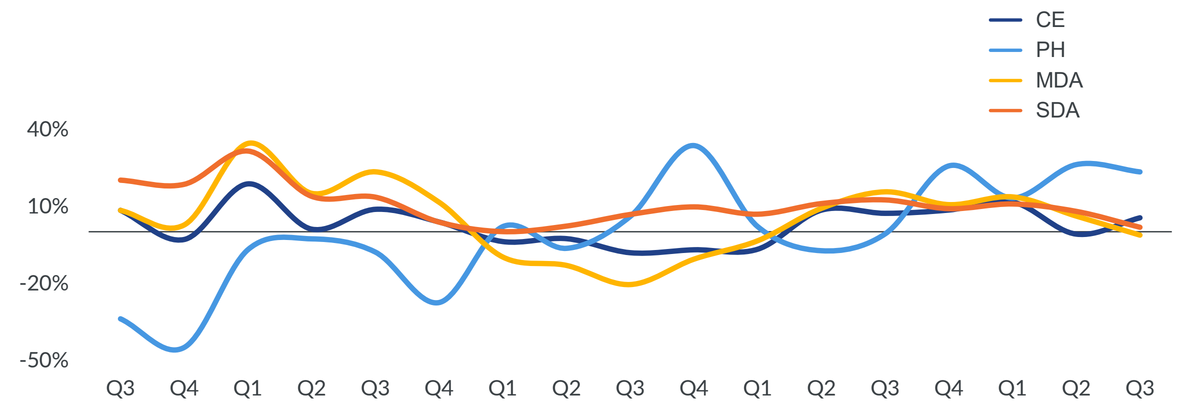
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Hungary

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

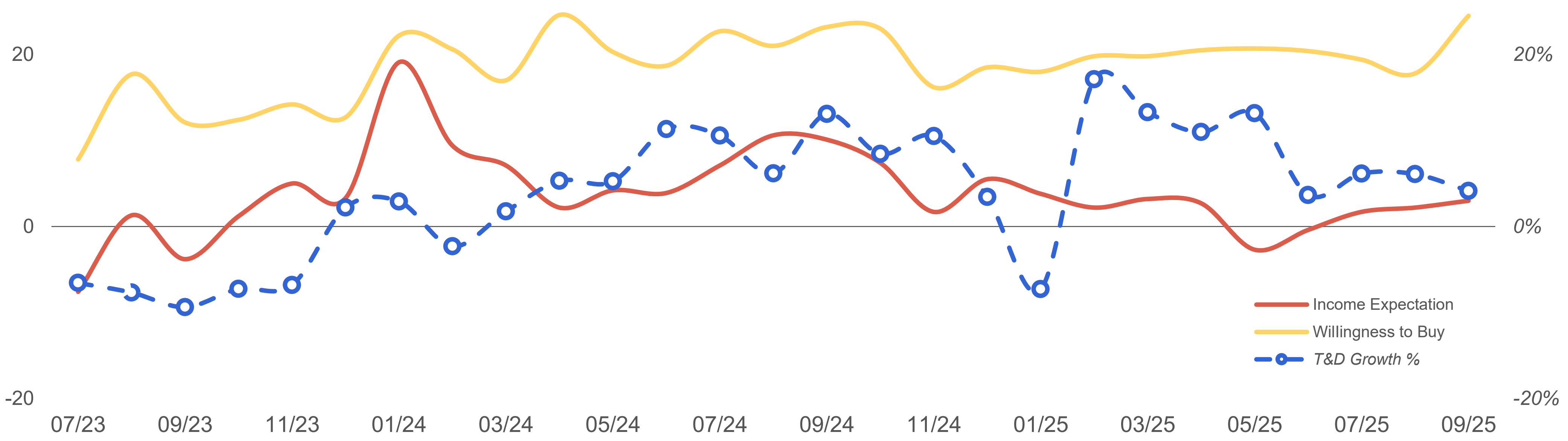
- The categories with the highest growth rates in IT/OE were storage, MFDs, monitors, and laptops. Sales of these categories increased better online than offline.
- In the telecom sector, only smartphones were able to perform better in Q3 than in the same period last year. Core wearables declined offline and stagnated online.
- With the exception of headsets, all CE product categories were able grow in Q3.
- In the MDA sector, the two main segments, cooling/freezing and laundry, could not outperform the Q3 2024 sales, and this caused an overall decline for the sector.
- In the SDA sector, robot vacuum cleaners, hairdryers, and hairstyles were the most growing segments compared to last year's Q3 period. Surprisingly, hot air fryers showed a double-digit decline in Q3, in traditional sales.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, 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)



GfK Consumer Climate – Reading example

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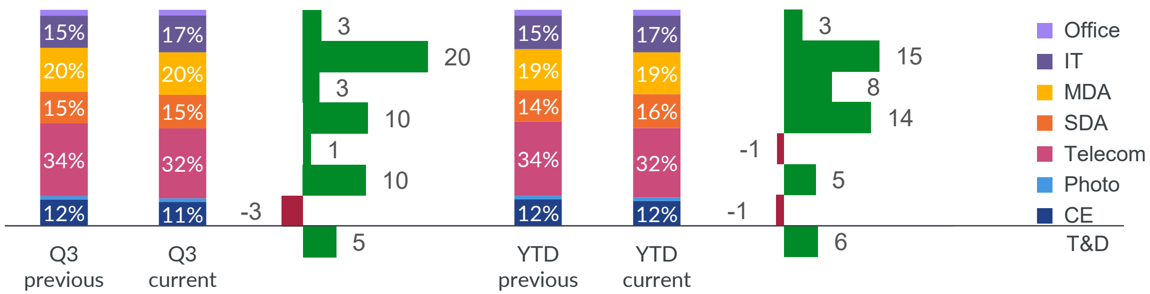
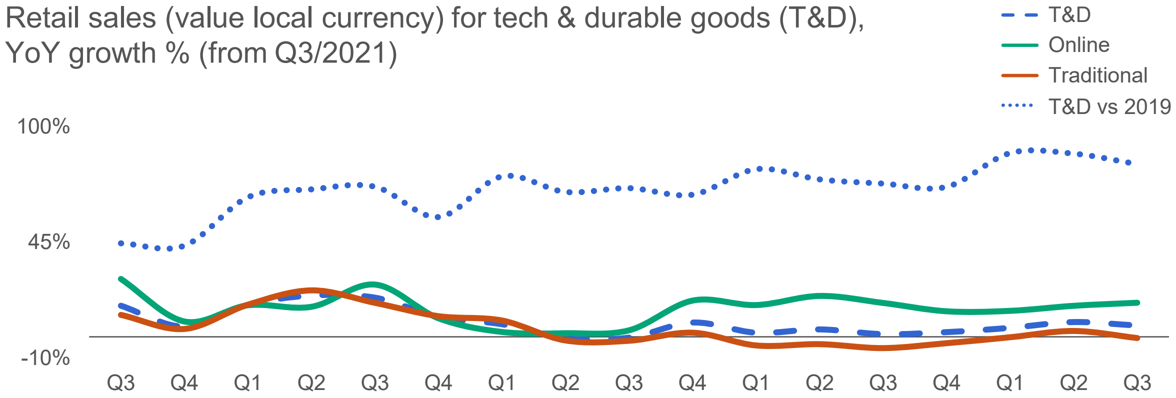
Helicopter View Poland

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 Q3/2021)



Key Insights

- In Q3 2025, the Polish Tech & Durables market recorded significant growth of 5% compared to Q3 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 Q3 2025, increasing by approximately 20% and raising its share of total T&D sales from 15% to 17%. SDA and photo also recorded strong growth (+10%).
- The consumer electronics sector emerged as the biggest drag on the market. Sales revenue fell by approximately 3%. CE, in which TV is the key product group, reduced its share to 11% in Q3 2025 (12% in Q3 2024).

Channel Dynamics

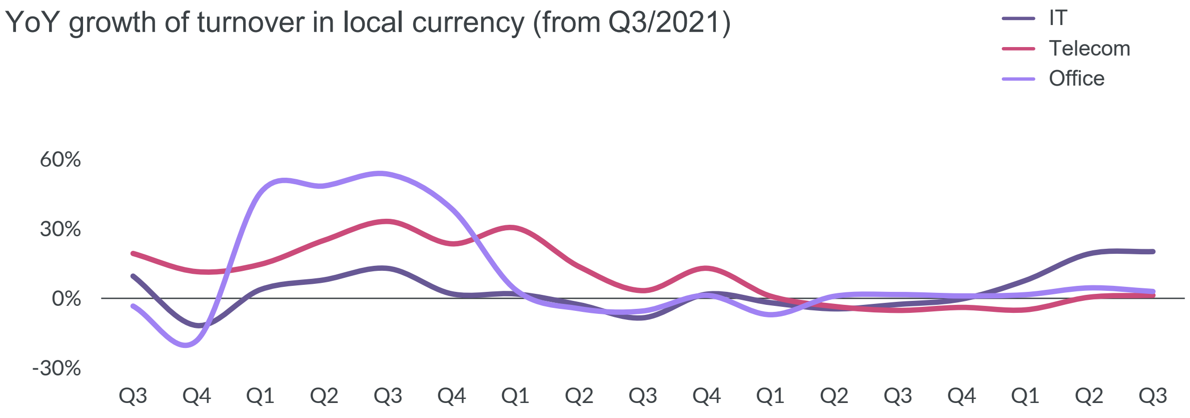
- The sales structure continued to shift toward online. It is estimated that e-commerce now generates about one-third of the T&D market value (approximately 36% in Q3 2025 compared to 32% a year earlier), while traditional retail accounts for the remaining two-thirds (its share is steadily decreasing). This trend highlights the growing importance of digital channels in distribution strategies.

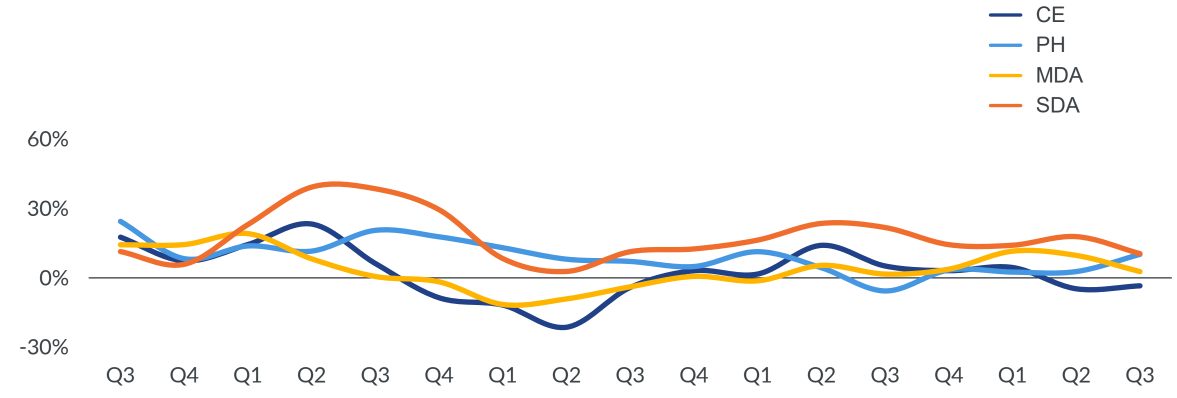
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Poland

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- Mobile computing momentum
  In IT/gaming hardware, mobile computing grew by nearly 29%, from 810M PLN to 1.043M PLN. This reflects sustained demand for laptops and portable devices, likely fueled by hybrid work and education needs. Additionally, the governmental program „Laptop for Teachers" supported the market a lot.
- Electric fryers boom
  The small domestic appliances sector is constantly growing, driven by air fryers, in particular. This surge suggests strong consumer interest in convenient cooking solutions, possibly driven by seasonal trends or promotional campaigns.
- Wearables losing steam
  The CE segment, with TVs as the most important group, declined by nearly 3%, from 425M PLN to 412 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 Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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Czech Republic

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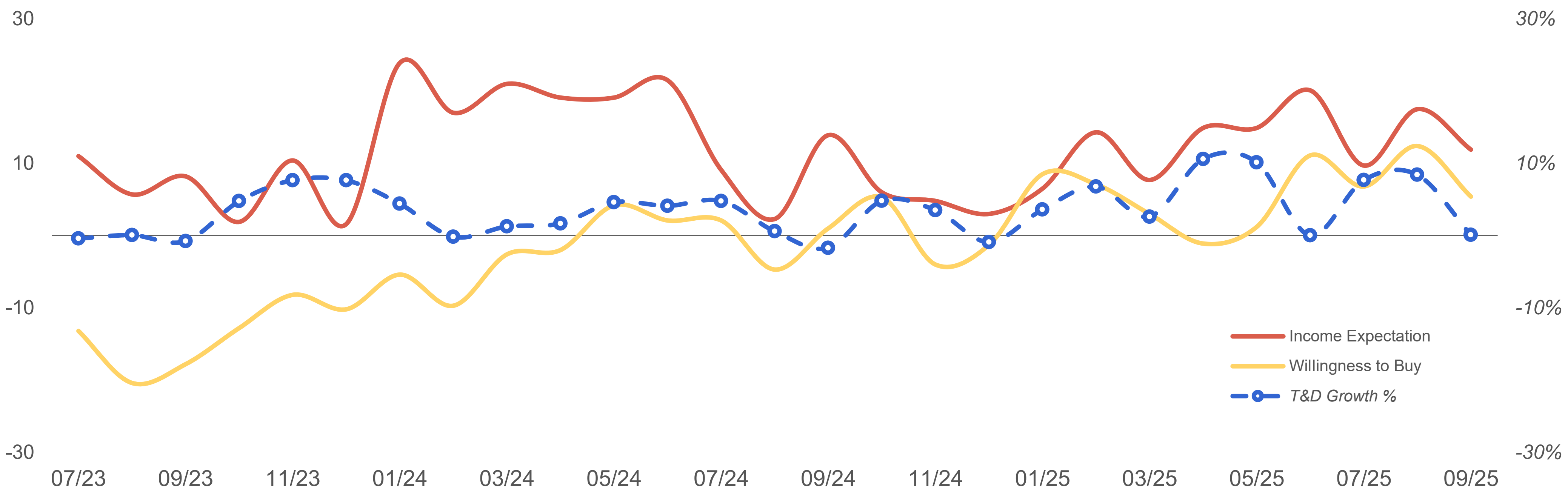
Spotlight on GfK Consumer Climate and T&D in Poland

Poland

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

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



GfK Consumer Climate – Reading example

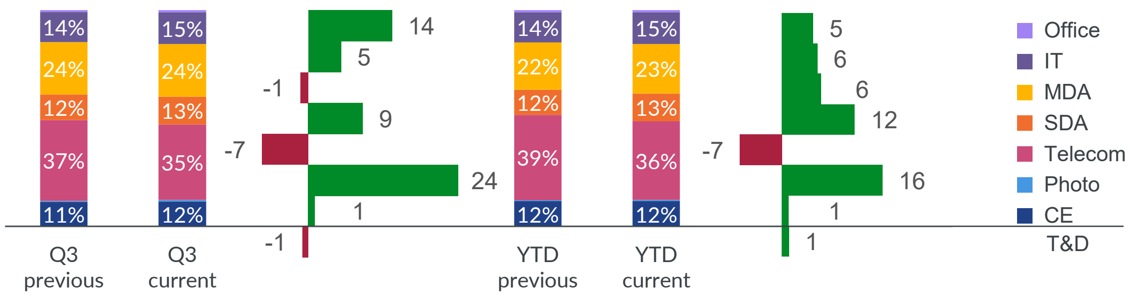
If an indicator is positive, this shows that consumers' assessment of this variable is above average in a long-term comparison, and vice versa for negative values.

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.

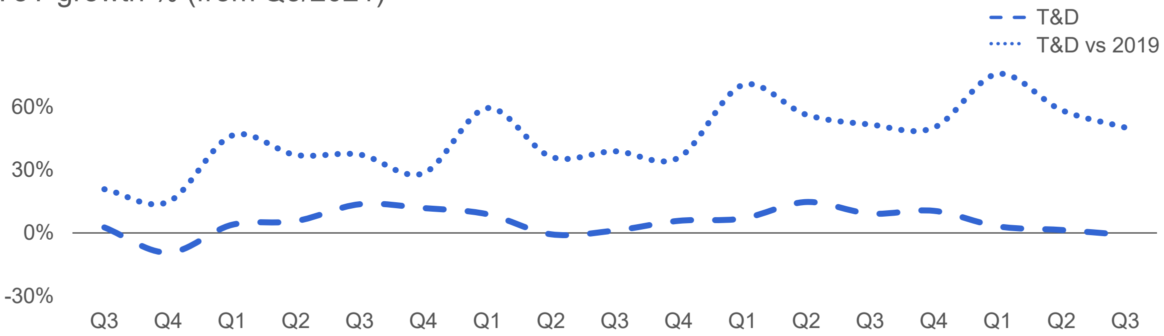
Helicopter View Romania

Romania
Contact person:
Raluca Manarcescu
(MI Lead)
Raluca.Manarcescu

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 Q3/2021)



Key Insights

- In Q3 2025, the Tech & Durables market in Romania experienced slight growth in unit sales (+1%), but a decline in overall value.
- While most sectors recorded positive trends in both value and volume, the telecom and MDA sectors saw a drop in value.
- The telecom sector continued to drop, registering a 7% decline on YTD September 2025.
- Romania's annual inflation rate surged in Q3 2025, with increases in consumer prices, particularly notable for non- food and services.

Channel Dynamics

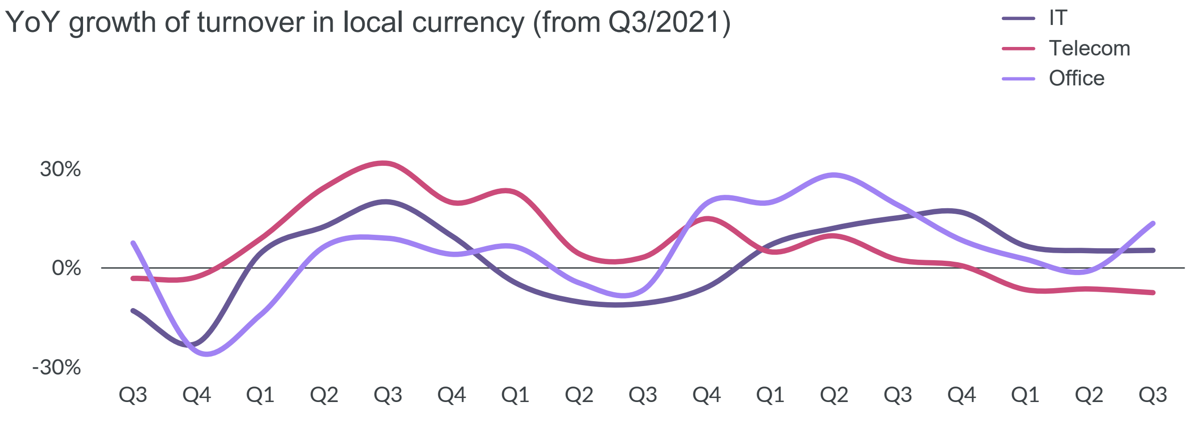
- Both TCR and Open Market channels continued the decreasing trend also in Q3 2025. For both Q3 2025 and YTD, the TCR channel had a higher contribution toward the decline of the sector.

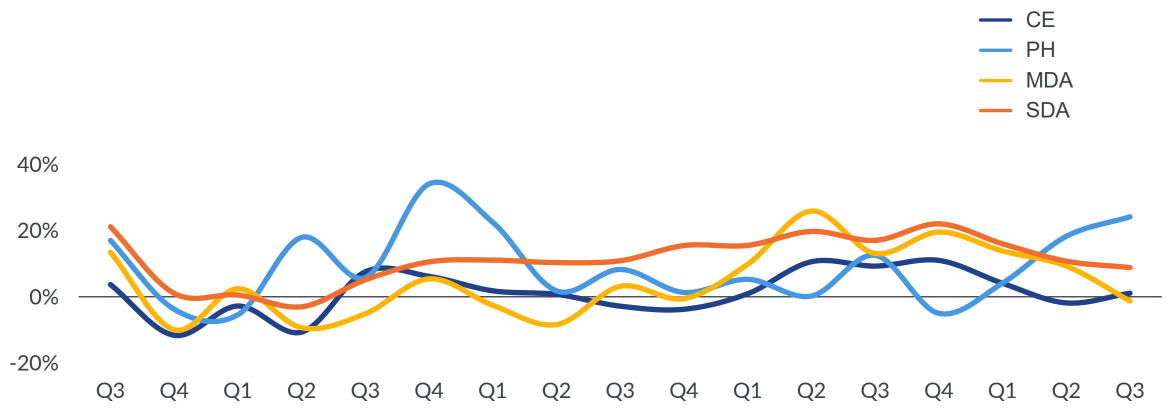
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office; channels reported for telecom sector only - for further information please contact your local key account manager

Helicopter View Romania

Romania
Contact person:
Raluca Manarcescu
(MI Lead)
Raluca.Manarcescu

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- In Q3, CE saw an increase of 2% in volume and a 1% rise in value. Mini-Bluetooth speakers, loudspeakers, and audio home systems experienced growth in both volume and value, whereas PTV showed growth in volume only.
- The SDA sector recorded a strong performance (+9%) in Q3 2025, driven by demand for hot beverage makers, dental care products, vacuum cleaners, irons, hair stylers, and shavers. In contrast, juicers, air fryers, and electric cooking pots saw declines in both unit sales and value.
- The IT sector registered a 5% increase in value across all categories in Q3 2025. However, volume growth was more modest, impacted by declines in monitors, mobile devices, and desktop computing. The office sector saw an increase in value, too, though volume growth was limited due to a drop in sales of multifunctional printers.
- The MDA sector saw a drop in value in Q3 and remained flat in volume. The sector was mainly impacted from drops in air conditioners, cooling, and freezers.
- In Q3 2025, the telecom sector experienced a 7% decline. This trend was primarily driven by the negative evolution of smartphones. Core wearables contributed to the downward trend.

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Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, 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

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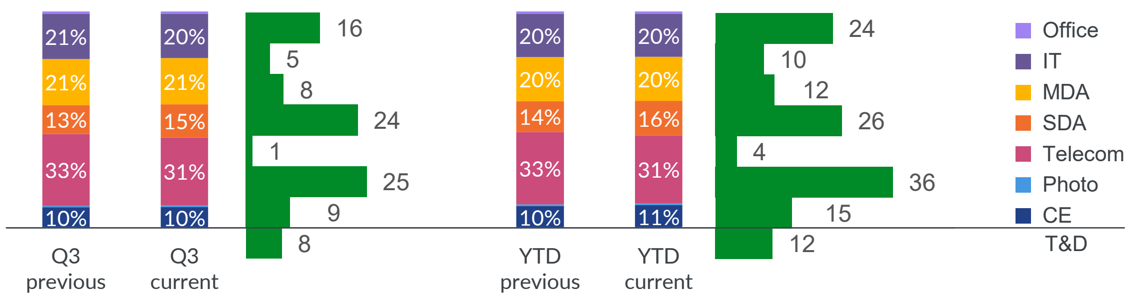
Helicopter View Ukraine

Ukraine

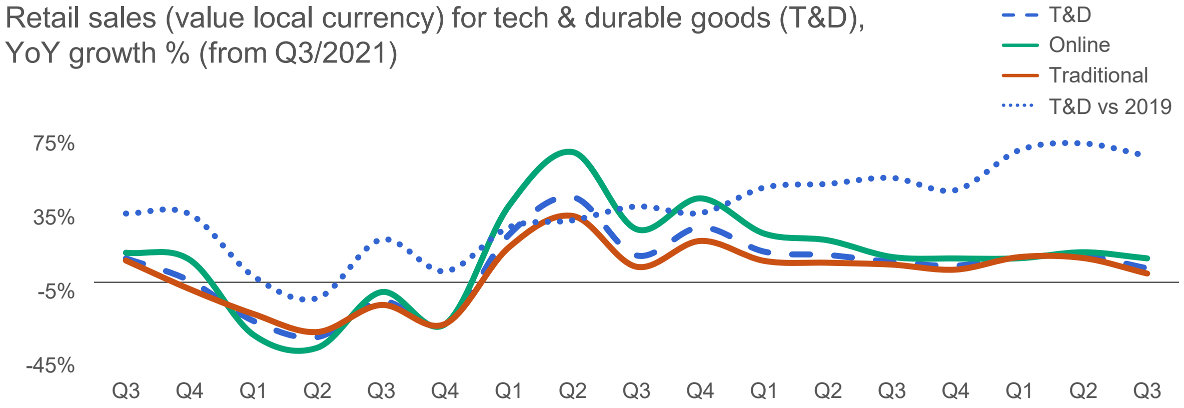
Contact person:
Serhii Shevchenko
(MI Lead)

Serhii.Shevchenko

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 Q3/2021)



Key Insights

- Telecom posted a modest +1% value UAH growth in Q3 2025, driven by growth of 5% for smart mobile phones in online sales. Core wearables also contributed positively, growing by +14% value UAH.
- The MDA market continued to demonstrate double-digit growth, with units and value (UAH) both increasing by 11% (excluding AC). The largest categories – washing machines and cooling – performed below market average.
- In Q3 2025, growth of SDA accelerated: +14% in units and +24% in value (UAH), with prices remaining stable.
- The IT sector slowed to +5% value growth in Q3 2025, driven by a weak performance in the two largest segments, mobile computing at +1.4% and media tablets declining by 3% in value (UAH).
- CE slowed to +9% value growth in Q3 2025. PTVs remained the key growth contributor at +12%, while loudspeakers softened to +3%, and headphones turned negative at -4% value (UAH).

Channel Dynamics

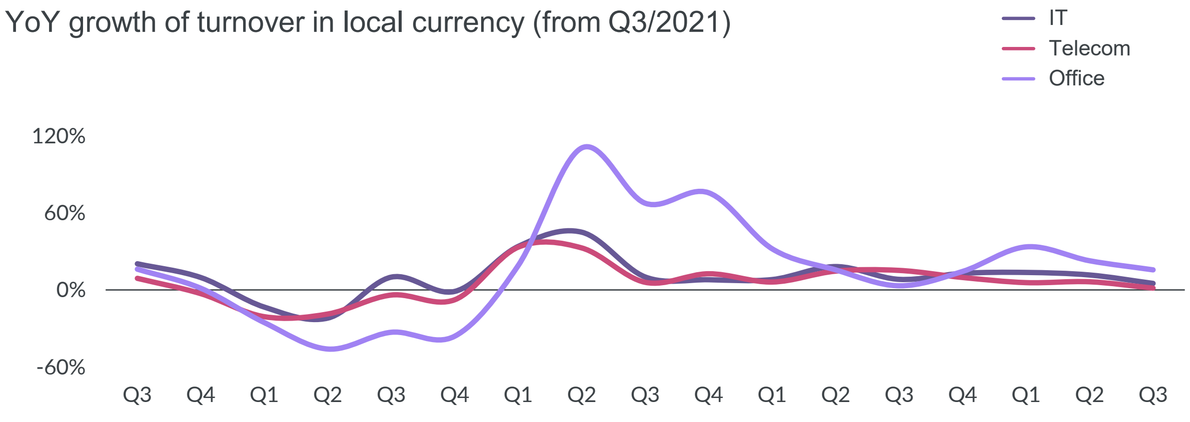
- In Q3 2025, online sales surpassed traditional channels and became the primary market growth driver.

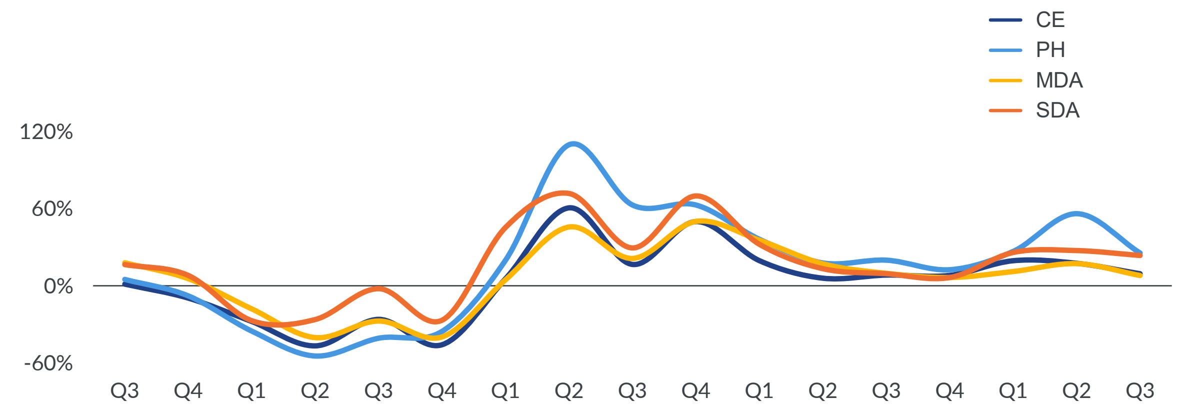
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Ukraine

Ukraine
Contact person:
Serhii Shevchenko
(MI Lead)
Serhii.Shevchenko

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

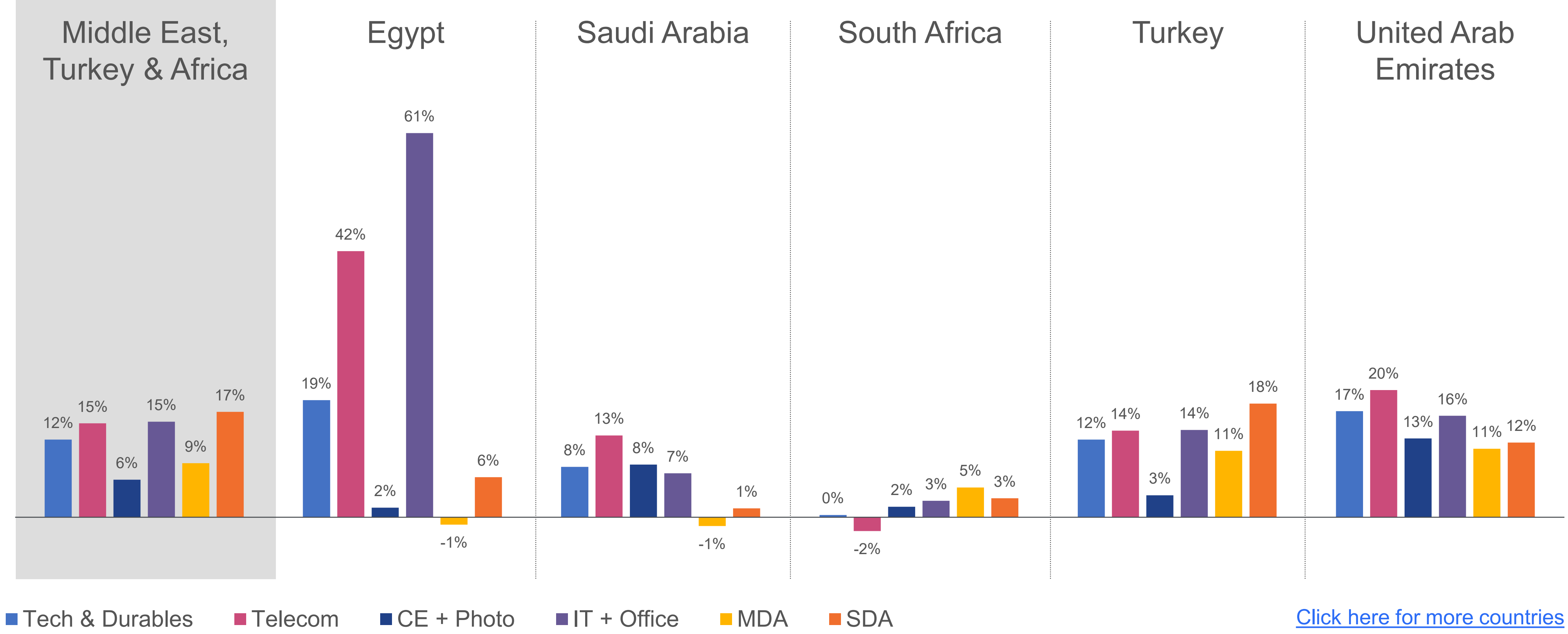
- Smartphones with 5000 mAh+ batteries boomed in Q3 2025, exceeding 20% value share. In core wearables, SIM-enabled smartwatches surged +29% (UAH), while fitness trackers grew just +1%.
- In mobile computing, gaming was the fastest-growing segment, up +37% in value (UAH) in Q3 2025. Intel processors outperformed overall and in gaming laptops, while Qualcomm posted triple-digit growth but kept a minor share. Desktop and monitors also grew strongly (up +16% and +35% in value (UAH)).
- MDA key markets continued to decelerate. Refrigerators slowed to +5% and washing machines to +8% in value (UAH). In contrast, dishwashers and tumble dryers emerged as the main growth drivers, accelerating to +30% and +54% in value (UAH), respectively.
- In Q3 2025, QLED with mini-LED emerged as the key growth driver in PTVs with +54% surge in volume. OLED and QD without mini-LED also posted double-digit growth, at +44% and +27% respectively, while LCD Only lagged at +7% in volume.
- Hot air fryers, hair care, and dental care remained the leading categories in terms of turnover and further strengthened their position within the SDA sector. In vacuum cleaners, positive trends were observed for robots (+3%) and wet & dry models overall (+6%).

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Double-digit growth across META, with all sectors contributing. Telecom, IT & Office, and SDA were above the T&D benchmark, in particular.

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

USD growth % YoY Q3/2025



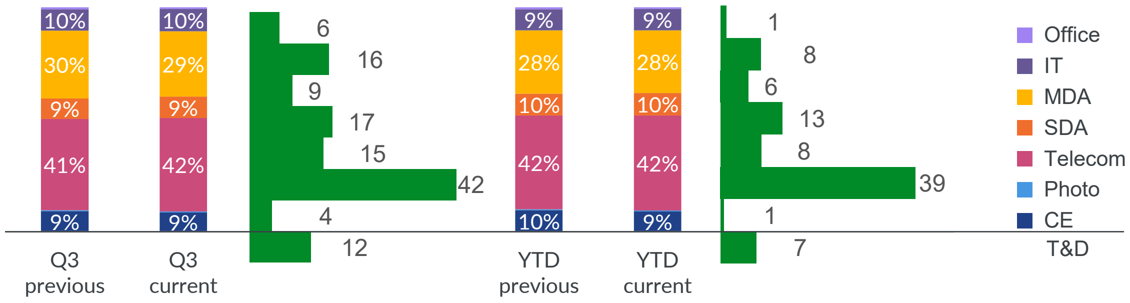
Click here for more countries

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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

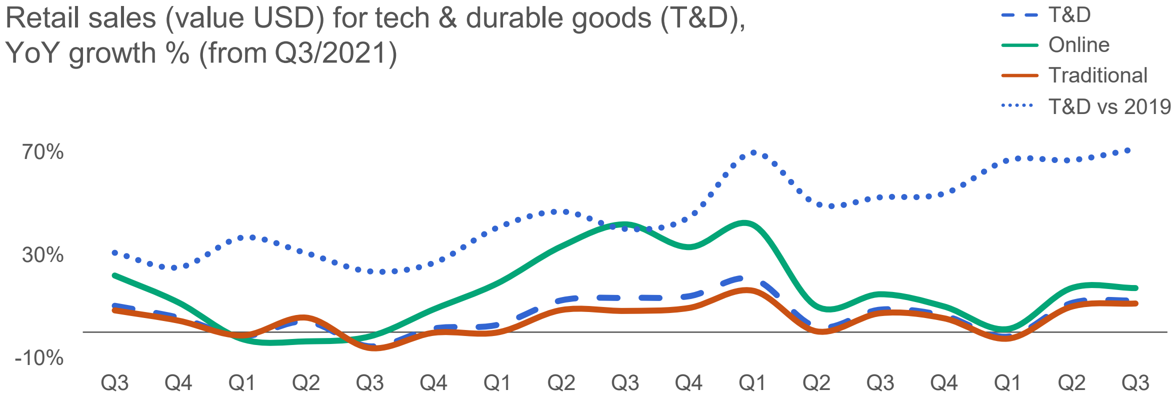
Helicopter View Middle East, Turkey & Africa

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 Q3/2021)



Key Insights

- The T&D market generated an uplift of 12% in Q3 YoY and performed significantly above the growth rate from H1 2025.
- Main growth drivers were SDA, IT, and telecom.
- MDA achieved significant absolute growth as well, but the growth rate was slightly trailing overall development for T&D.
- CE went back to growth in Q3 after YoY decline in H1 2025, turning the overall sector positive for YTD September 2025.
- The photo sector saw immense sales increases vs the previous year, but the base is very small (T&D contribution <1 percentage point).

Channel Dynamics

- The online channel continued the long-term trend of outperforming traditional offline sales also in Q3 2025. All sectors contributed to double-digit growth overall.
- Offline sales were not far behind online development, only consumer electronics and MDA stagnated in Q3 with all other segments showing significant growth.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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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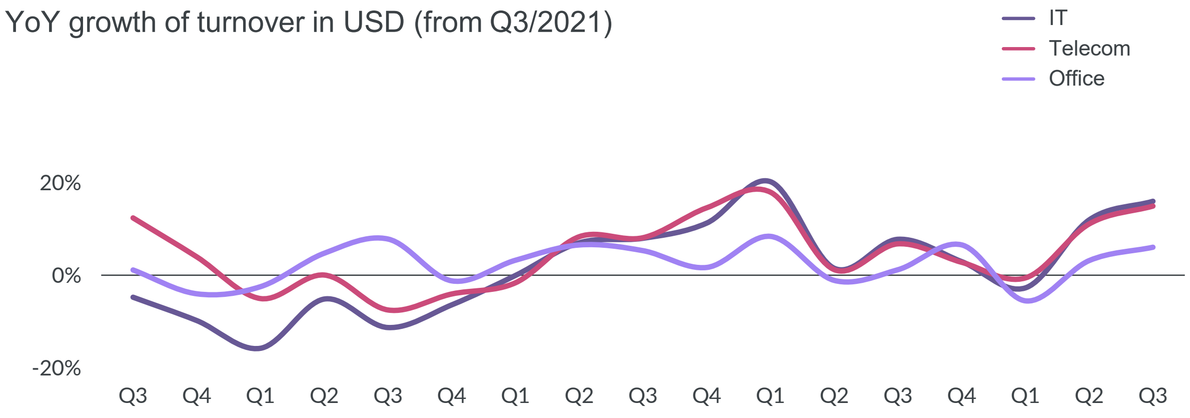
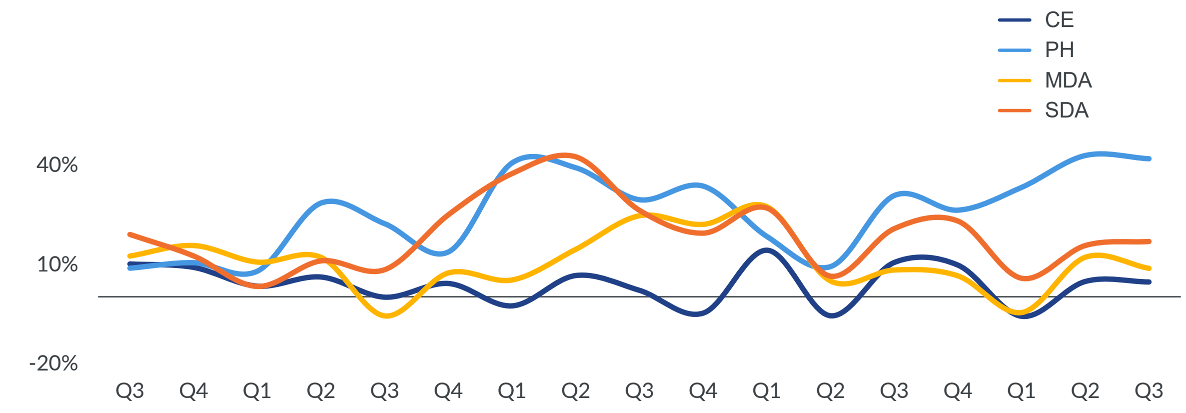
Helicopter View Middle East, Turkey & Africa

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

YoY growth of turnover in USD (from Q3/2021)





Growing & declining product segments

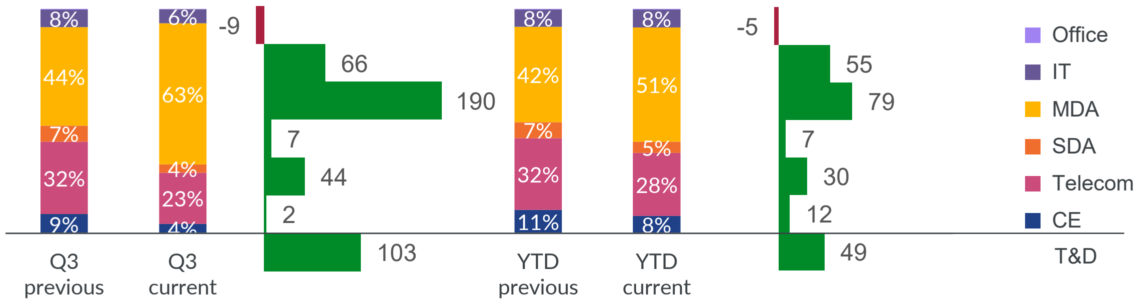
- The telecom sector recorded balanced growth across both online and offline channels in Q3 YoY, with South Africa being the only market unable to deliver absolute growth.
- The IT sector achieved strong expansion across all markets, led particularly by Egypt, Turkey, and the UAE, which stood out as key growth drivers.
- The office sector posted a more moderate uplift, underperforming the overall T&D trend as Egypt and South Africa continued to face challenges in this category.
- SDA growth was supported by all markets except Saudi Arabia, where the sector remained stagnant.
- MDA delivered only marginal growth in Q3, with overall performance constrained by declines in Egypt and Saudi Arabia.
- The turnaround in consumer electronics was enabled by growth contributions from all markets.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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

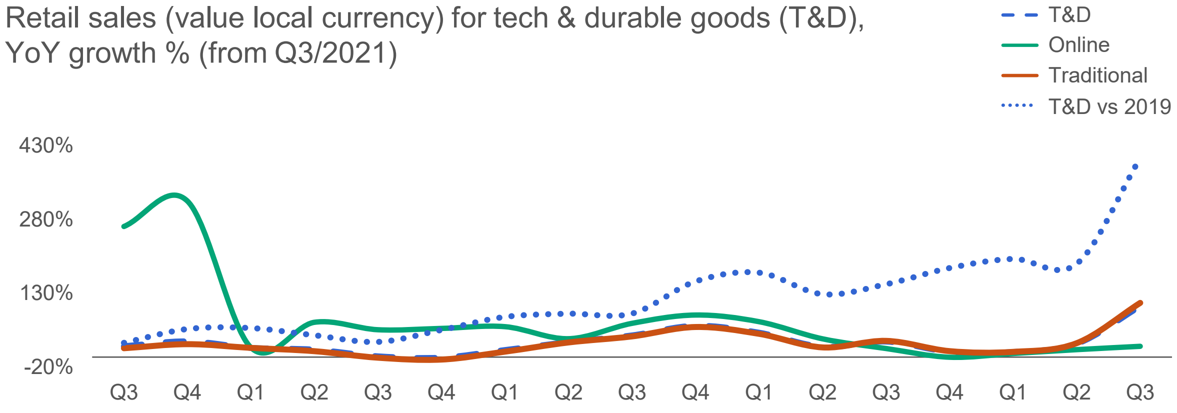
Helicopter View Egypt

Egypt
Contact person:
Dina Abdel Ghany
(MI CSG Manager
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 Q3/2021)



Key Insights

- Inflation cooled down throughout the quarter: annual urban CPI eased from 13.9% (Jul) to 12.0% (Aug), and to 11.7% (Sep), driven mainly by a sharp slowdown in food inflation. Monthly CPI rose +1.8% MoM in September due to higher prices for fruits/vegetables and services.
- With respect to household-relevant price dynamics, the CAPMAS/CBE data showed household appliances and rents/maintenance contributing to monthly inflation in August and September with an impact on durables' affordability and basket trade-offs.

Channel Dynamics

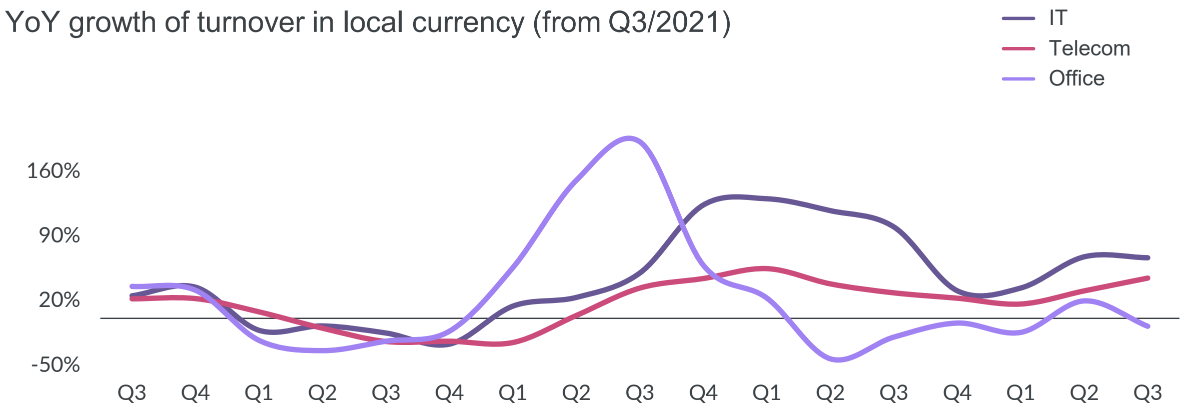
- Following the heavy promotional activity in Q1, chains continued to face pressure, signaling a slowdown in momentum. However, performance rebounded in Q3, with growth of 9% vs the previous period and +16% vs Q3 last year. Independents on the other hand gained traction, posting growth of +8% vs Q3 2024.
- Offline channels also recovered compared to Q3 2024, driven by strong demand for home climate control, while online surged +30%, bouncing back after the post-promo market dip.

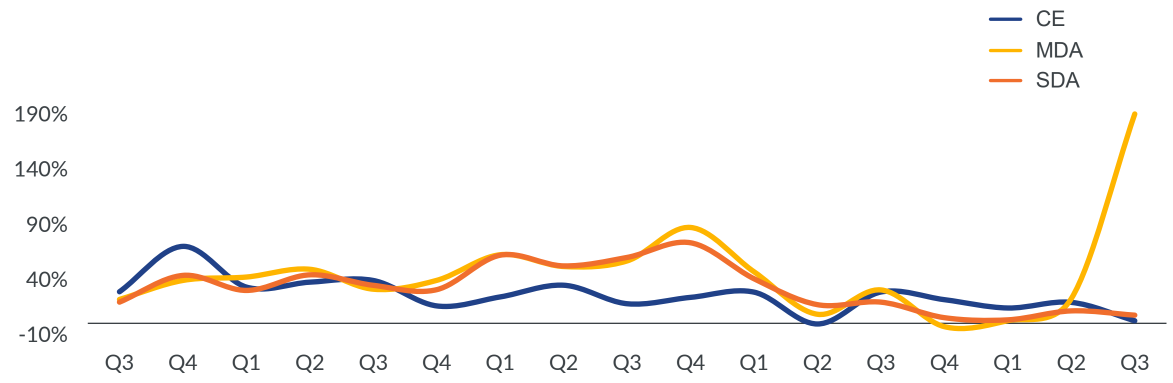
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Egypt

Egypt
Contact person:
Dina Abdel Ghany
(MI CSG Manager
Dina.AbdelGhany

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- In Q3, the IT sector grew +36% YoY in terms of volume. Its recovery continued after the Q1 dip, but the pace slowed down due to weak media tablet sales. Key drivers were entry laptops (back-to-school boost) and gaming accessories. Cloud-ready devices and business notebooks gained traction with SME digitalization.
- In telecom, volume growth was +21%. Key drivers were Samsung phablets and mid-tier smartphones.
- Home climate control continued its strong growth vs prior year, driven by extended demand caused by heatwaves. We could observe a shift to energy-efficient inverter AC models.
- MDA grew in Q3, likely driven by a budget reallocation to seasonal categories. In contrast, SDAs declined due to lower seasonal urgency and a slowdown in discretionary spending.
- The CE sector experienced the sharpest drop, driven by a pullback after strong prior quarters and led by a decline in Samsung small-screen PTVs.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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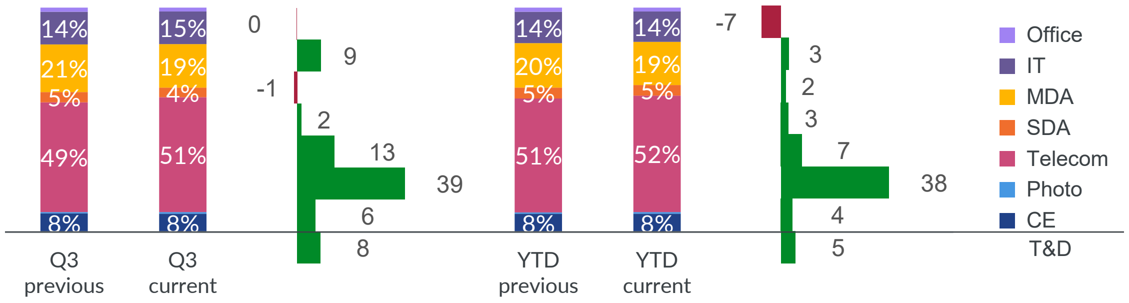
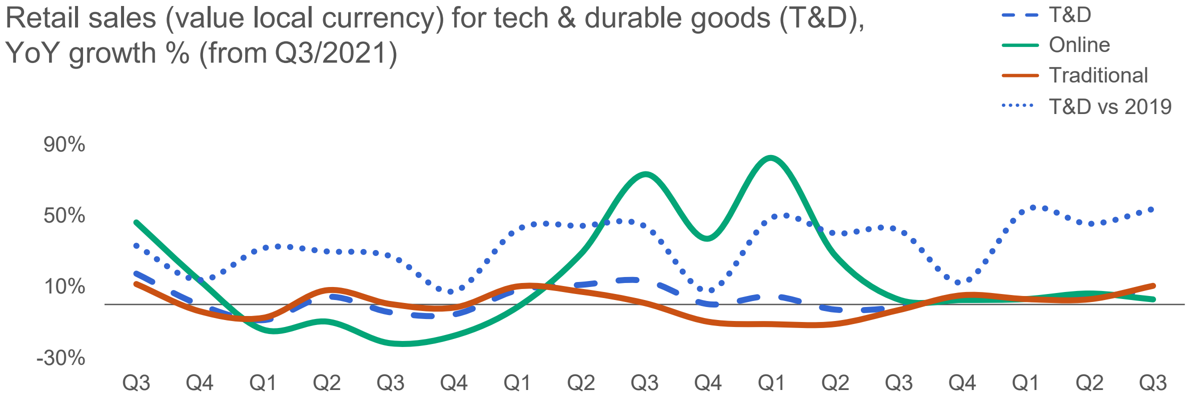
Helicopter View Saudi Arabia

Saudi Arabia
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 Q3/2021)



Key Insights

- The T&D market expanded by 8% YoY in Q3, lifting year-to-date growth to 5%.
- MDA was the only major category to post an absolute decline in Q3, following positive momentum in H1 2025.
- Telecom delivered strong value growth of 13%, driven by sustained demand for premium devices.
- SDA maintained its steady upward trajectory, posting a modest +2% YoY increase.
- Both IT and CE accelerated their growth versus H1, highlighting a robust Q3 performance across both sectors.

Channel Dynamics

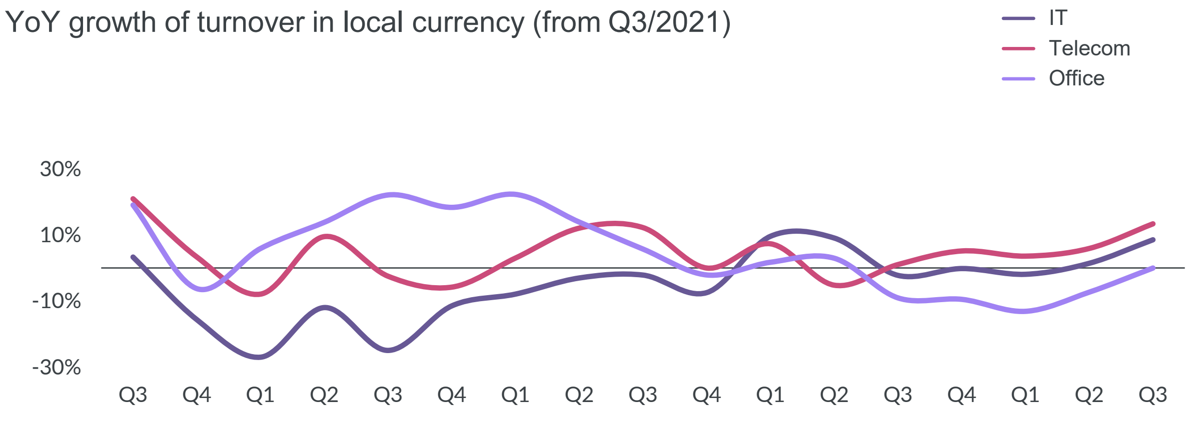
- From a channel perspective, KSA experienced a notable shift back toward offline retail in Q3, with double-digit YoY growth. Only home categories (MDA and SDA) recorded declines.
- The online channel grew marginally (+2%), with MDA, SDA, and CE showing gains. However, the dominant telecom sector softened overall market development.

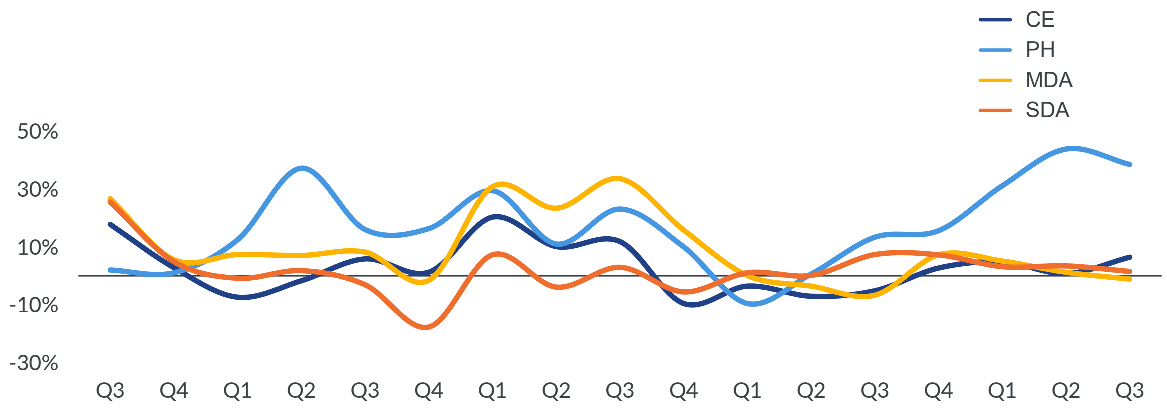
Source: GfK Market Intelligence: Sales Tracking, Panelmarket incl. Expansion, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Saudi Arabia

Saudi Arabia
Contact person:
Nicolet Pienaar
(MI Lead)
Nicolet.Pienaar

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- The IT sector recorded significant growth versus H1, supported by strong performances across key segments such as laptops, tablets, and monitors.
- The office sector remained stagnant, with printer sales declining sharply. Although part of the steep H1 contraction was recovered, YTD performance still stands at -7%.
- Telecom growth was primarily driven by robust demand for smartphones and smartwatches.
- Within CE, strong gains in headsets, Bluetooth speakers, and headphones more than offset declines in TVs and audio home systems.
- MDA posted a slight overall decline across most segments, with only cooking appliances and washing machines showing positive momentum.
- SDA growth was driven by air treatment, vacuum and steam cleaners, irons, and shavers, while electrical cooking, coffee makers, and hair care products underperformed in Q3.

Source: GfK Market Intelligence: Sales Tracking, Panelmarket incl. Expansion, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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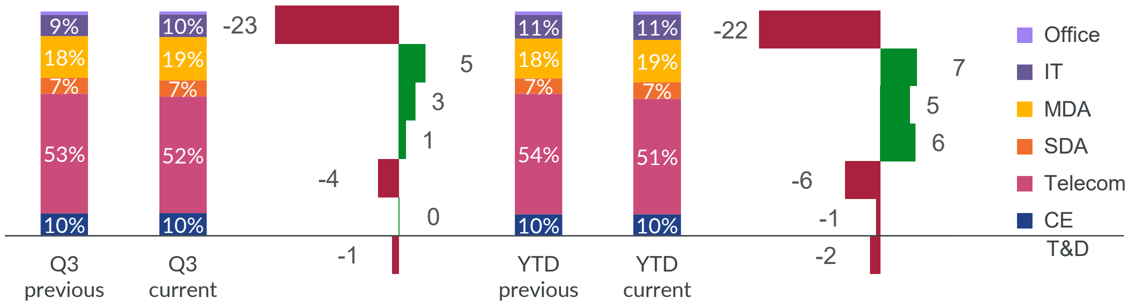
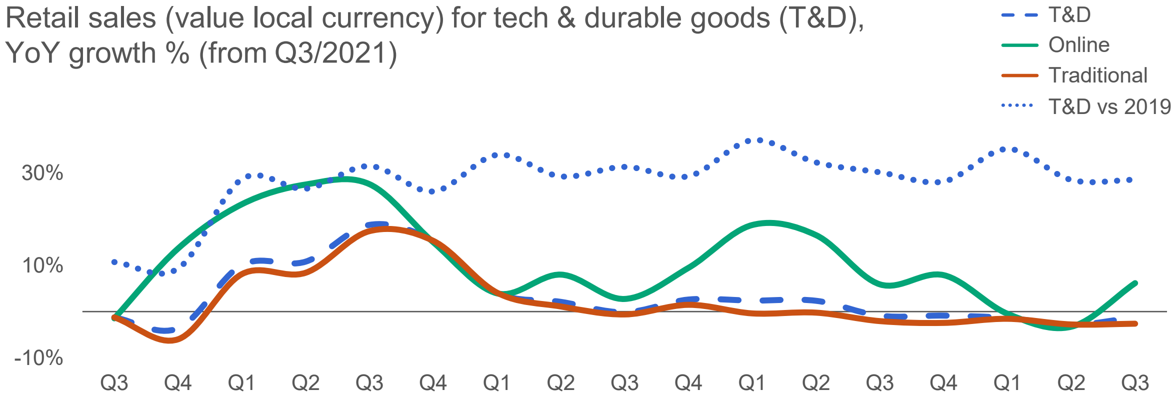
Helicopter View South Africa

South Africa
Contact person:
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 Q3/2021)



Key Insights

- Q3 2025 reflected a mixed but stabilizing performance across South Africa's Tech & Durables industry. While volume growth returned in most in-home categories, value performance remained subdued, largely due to continued ASP declines and aggressive discounting. The market showed signs of recovery in consumer demand, especially in IT, MDA, and SDA, supported by replacement cycles and lifestyle-driven purchases.
- Smartphones and office sectors continued to drag overall performance, with telecom value and volume both down, despite prepaid growth. The office segment faced its steepest decline, losing over 20% in value and 30% in volume, driven by weak printer and consumables demand.

Channel Dynamics

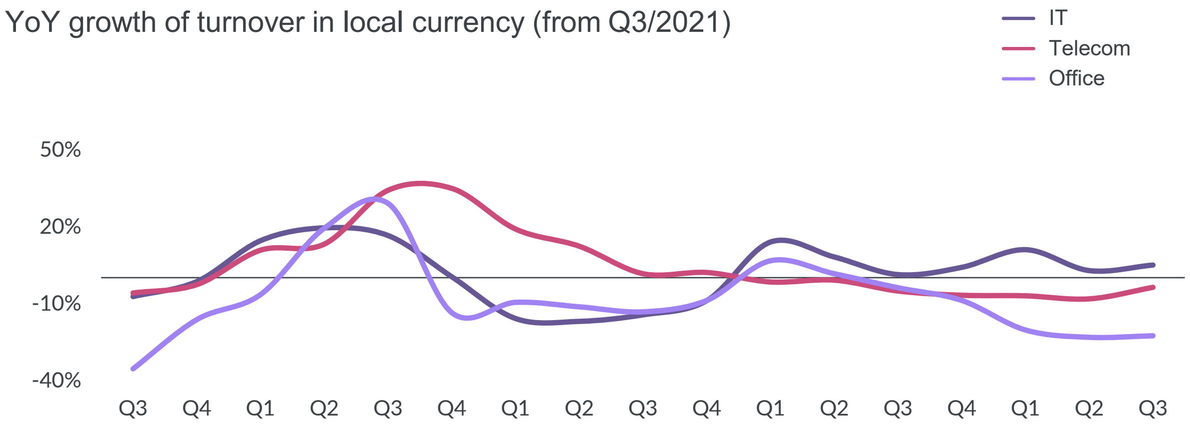
- Online sales recovered in Q3, gaining slight share due to declines in traditional stores. While not showing strong growth, the channel benefited from consumer shifts toward convenience and value, especially in SDA and MDA categories.

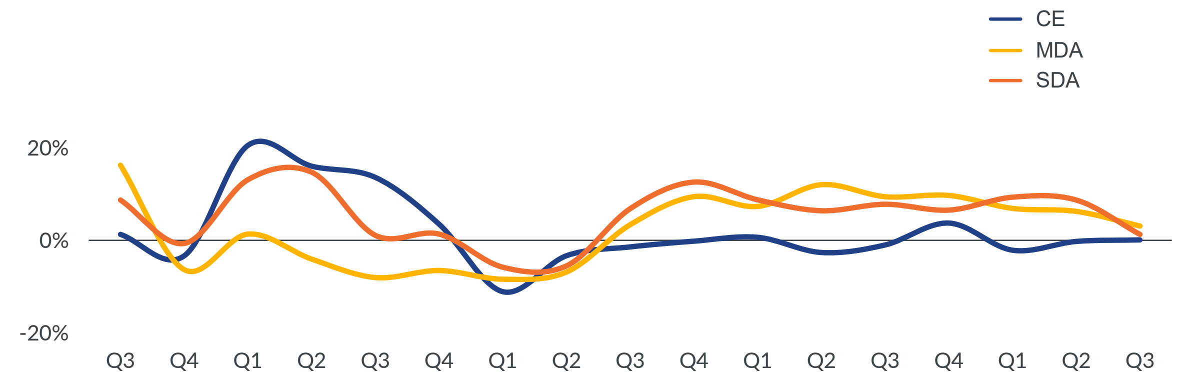
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View South Africa

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- The IT sector showed steady growth, supported by strong demand for laptops, monitors, and routers. A move to lower average selling prices helped boost volumes, with consumers upgrading devices as part of the replacement cycle.
- SMP unit sales continued to grow, supported by strong prepaid demand and competitive pricing in mid-tier segments. However, declining average selling prices limited overall market value recovery. The post-paid market remained in decline, with growth concentrated in affordable and mid-premium price bands.
- CE saw a slight uptick, led by headphones and headsets. PTV grew for two consecutive quarters including Q3, but unit demand was still lower than last year. LED displays declined sharply, while OLED, QLED, and mini-LED gained traction as consumers seek better viewing experiences.
- MDA maintained positive momentum, with highest growth in cooking and laundry appliances driving this. Price erosion persisted, especially in cooling, but volume gains helped offset value declines.
- SDA saw stable growth, led by demand for convenience-focused products like air fryers and coffee makers. Online channels continued to support performance despite lower average prices.

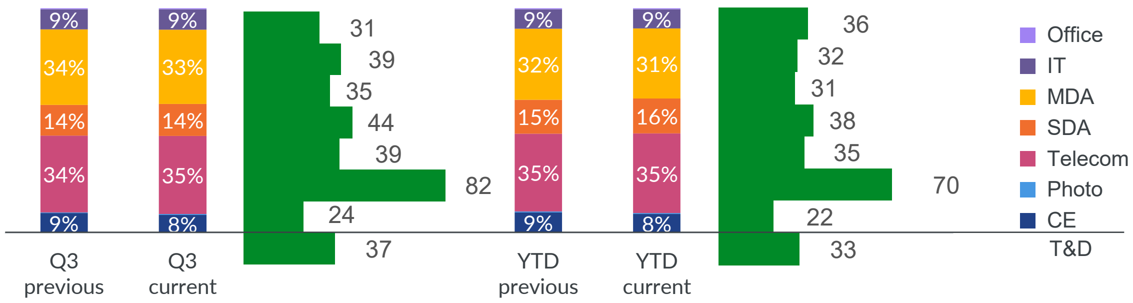
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

PREV NEXT

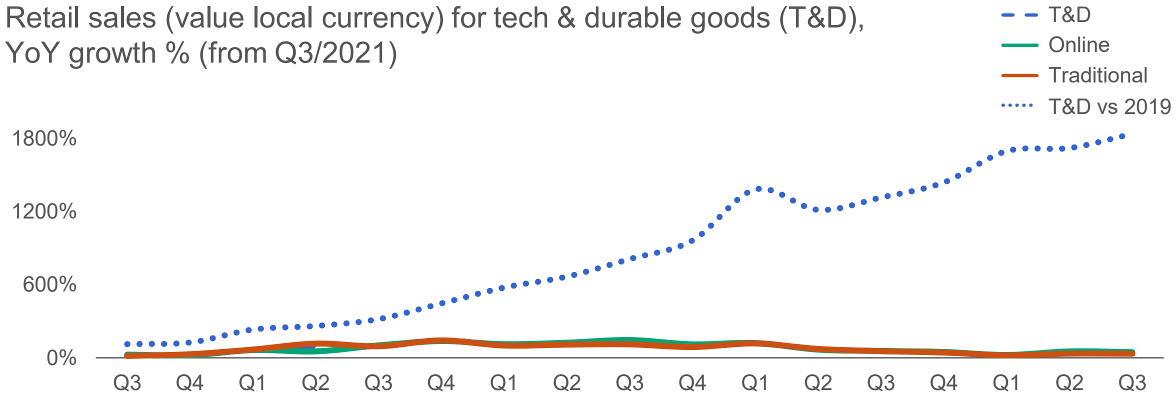
Helicopter View Turkey

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 Q3/2021)



Key Insights

- In the context of persistently high inflation (exceeding +30%), all sectors continued to demonstrate strong growth momentum. While Q2 2024 was notably weak, Q3 of last year marked a significant recovery. In 2025, this upward trend has not only persisted but accelerated, with growth figures surpassing even last year's elevated levels. The performance reflects both the inflationary environment and sector-specific dynamics contributing to sustained expansion.

Channel Dynamics

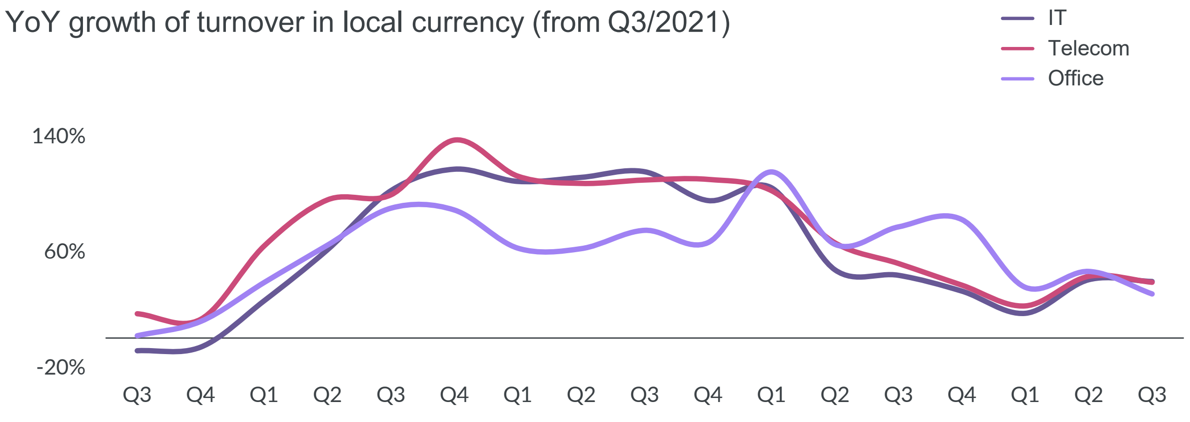
- While traditional sales grew by 10% in USD in Q3 2025, online sales grew by 21%.
- In Q3, the total market increased by 12% in USD and units were up 8%.

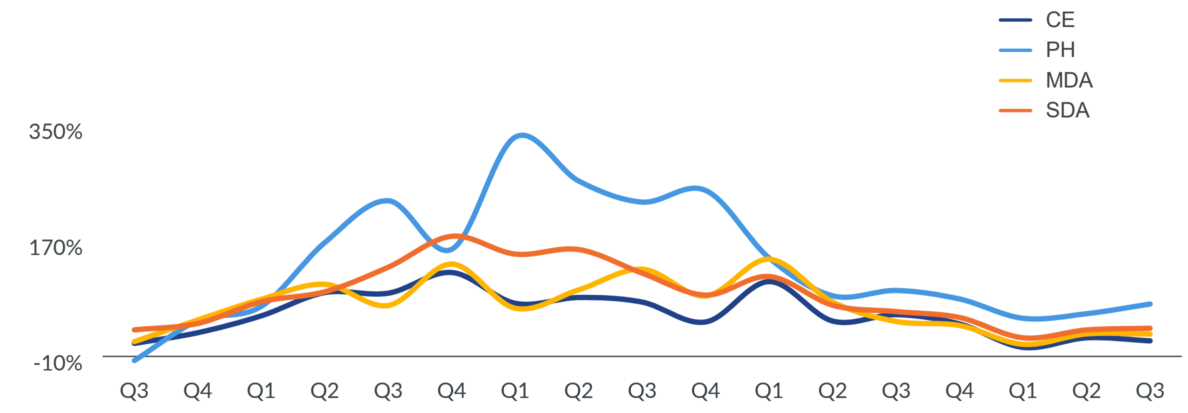
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Turkey

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- The IT sector grew by 14% in value YoY, driven by all product groups. Top performers included visual cams (+177%), media tablets (+33), and desk computing (+27%).
- The office sector increased by 7% in value while units declined by -4%. Cartridges and laser SF printers were the product groups that negatively impacted value growth.
- Telecom grew by 14% in value YoY despite a -4% decline in units. Smartphones led at 15%. Headsets posted 3% value growth while unit sales shrank (-12%). Core wearables continued to decline in both value (-8%) and units (-18%). Mobile phones demonstrated higher growth at 32% in value, even with an -8% unit drop.
- MDA grew by 2% USD, led by built-in hobs (+17%) and hoods (+8%). Washing machines (10+ kg) grew by 18%, while the 8 kg segment declined by -20%. Tumble dryers recorded a modest overall growth of 3%, with the 10+ kg segment being the standout performer, surging by 60%.
- CE rose by 4% in value, driven by camcorders at +69%. Digital cameras claimed second place. Within PTV, 70”+ screens jumped 27%, and 51”-59” screens declined by -1% in value terms.
- The SDA sector increased by 12%. Top performers included shavers (+24%), hair stylers (+21%), and vacuum cleaners (+14%). Electric fryers continued their downward trend at -60%. Steam cleaners, which had seen exceptional growth in the previous quarter, moderated to +31% in Q3.

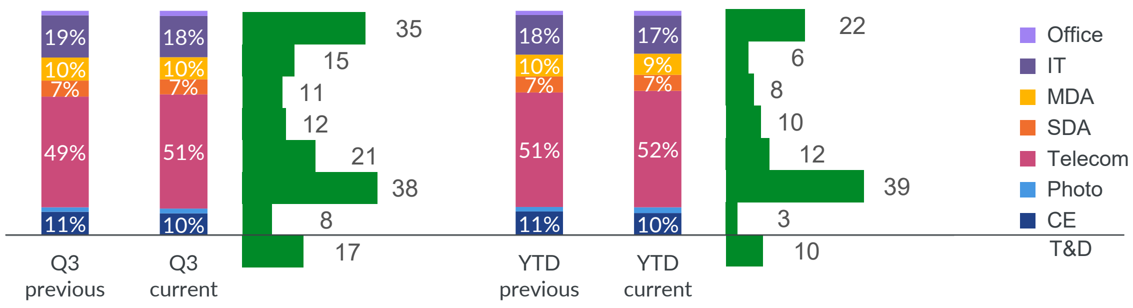
PREV NEXT

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

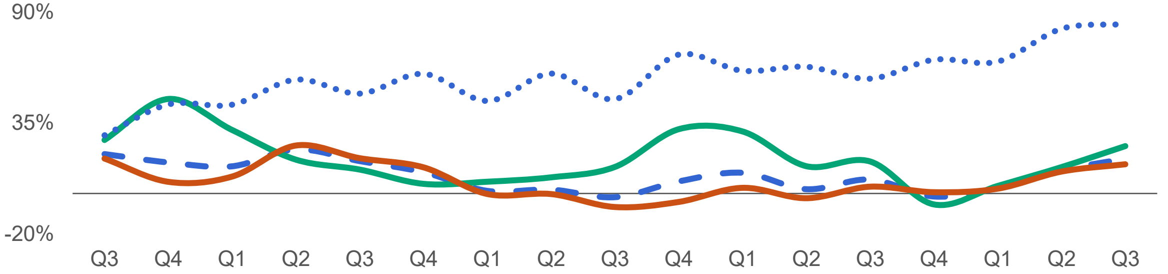
Helicopter View United Arab Emirates

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 Q3/2021)



Key Insights

- Tech & Durables recorded strong growth of 17% in Q3 and maintained a robust 10% YTD increase compared to last year.
- The IT market posted a strong 15% growth in Q3 and a steady 6% YTD increase.
- The photo sector continued its strong performance with an impressive growth of 38% in Q3 and 39% YTD.
- MDAs continued their upward trend with an increase of 11% in Q3.
- SDA sustained its strong performance, posting +10% YoY supported by 12% uplift in Q3 alone.
- The telecom sector registered a significant plus of 21% in Q3.
- CE could increase sales by 8% in Q3 YoY, after being flat in H1.

Channel Dynamics

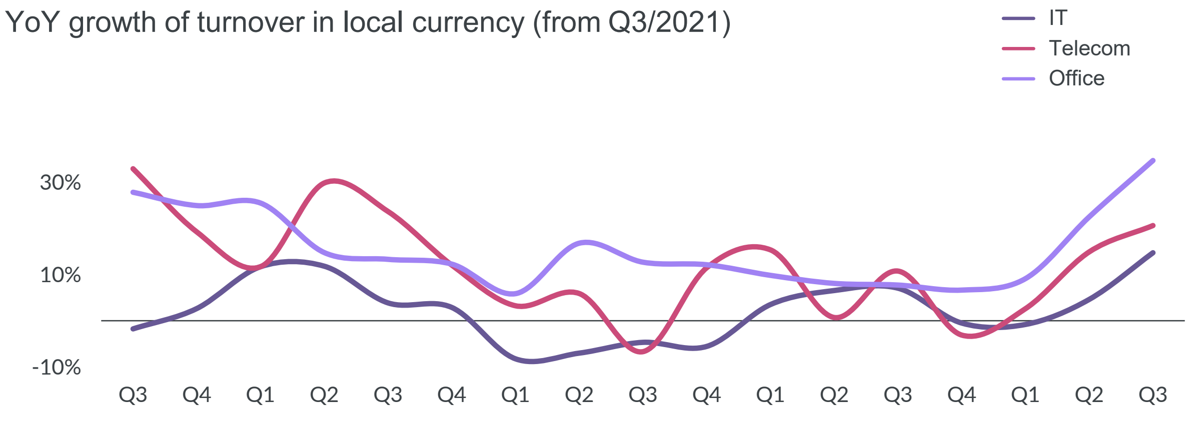
- The T&D market continued to show double-digit growth in Q3, supported by both online and offline channels. Online sales outperformed offline throughout the year, even though only marginal in H1 2025.

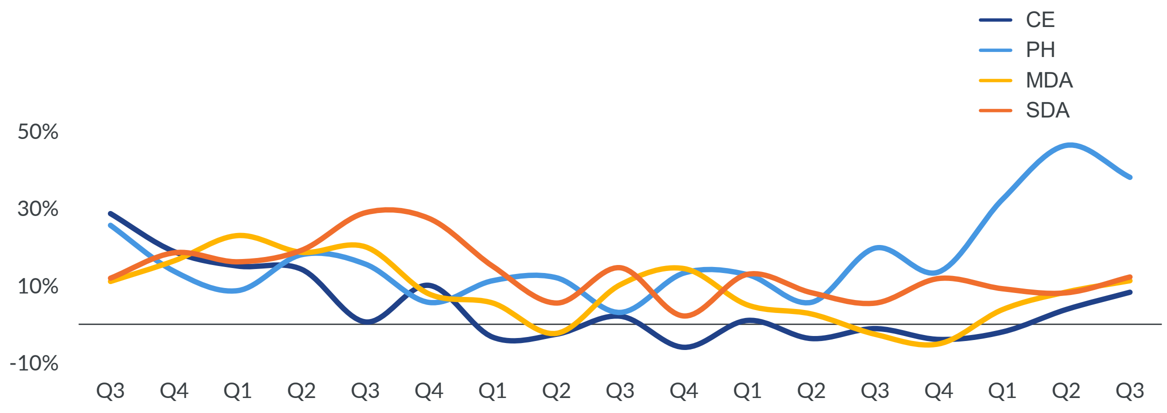
Source: GfK Market Intelligence: Sales Tracking, Panelmarket incl. Expansion, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View United Arab Emirates

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

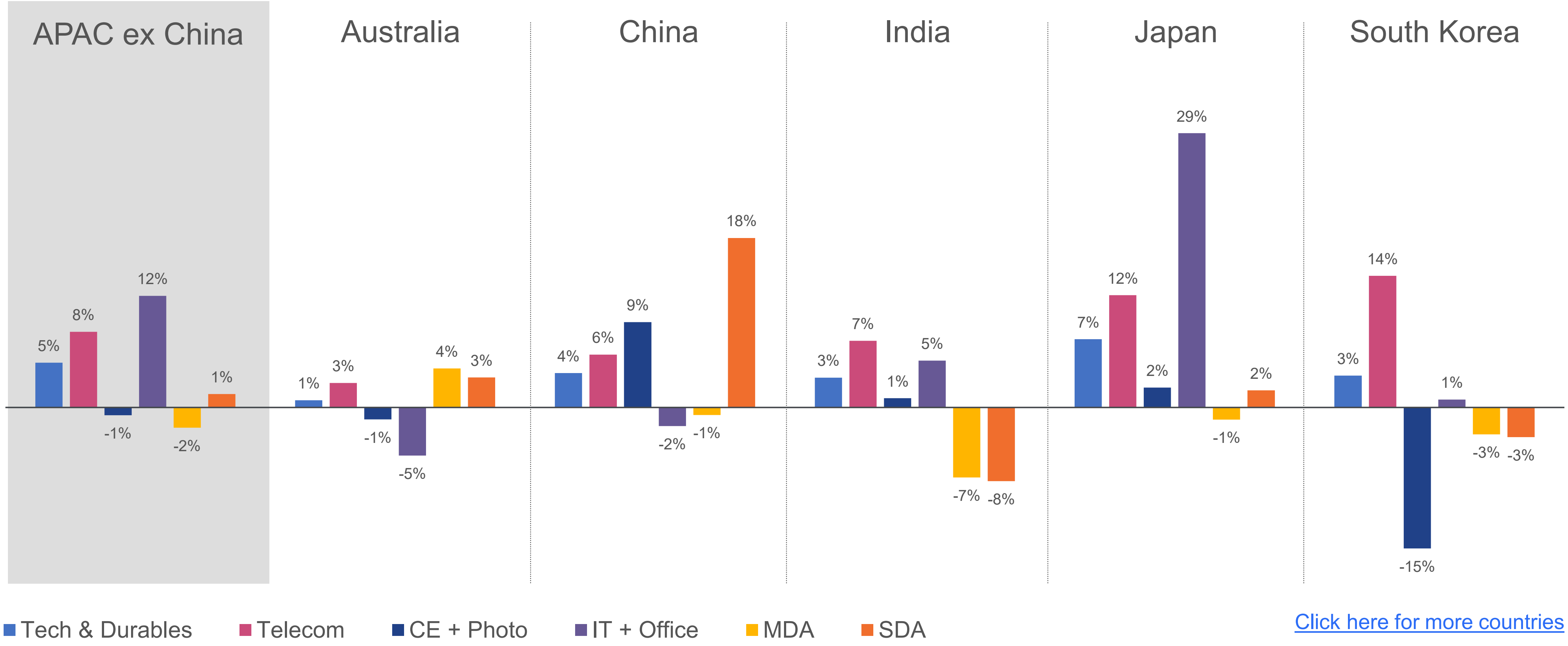
- IT sector growth was driven by most categories, with desktop computers leading the surge. Additionally, mobile computing and media tablets registered significant gains.
- All office segments contributed to the positive momentum within the sector.
- Telecom growth was primarily driven by increased demand for larger-screen smartphones.
- The CE sector saw an increase across all sub-segments.
- Within MDA, all the categories experienced growth in Q3.
- In the SDA sector, all categories posted growth in Q3, except for fryers and hair stylers. Key drivers of value growth in the sector included vacuum cleaners, shavers, and hair dryers.
- 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 Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Tech & Durables growth driven by large sectors such as Telecom and IT.

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

USD growth % YoY Q3/2025



Click here for more countries

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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
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South Korea
Latin America
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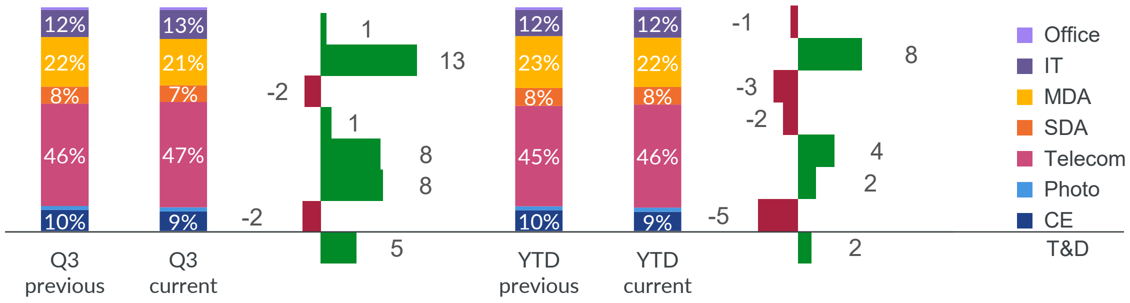
Helicopter View APAC ex China

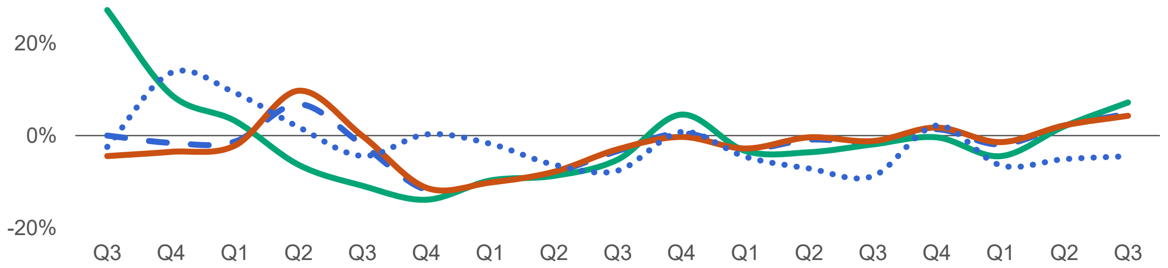
APAC ex China
Contact person:
Mukund Tripathi
(MI Lead)
Mukund.Tripathi

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 Q3/2021)

T&D
Online
Traditional
T&D vs 2019



Key Insights

- The APAC Tech & Durables market saw growth in Q3 2025, improving from the past two quarters with consumer confidence improving and interest rates declining.
- Growth was driven mainly by telecom and IT sectors. Telecom grew with general replacement cycles after a few years of decline. Consumers were replacing their older phones. The IT sector grew due to a preemptive purchase by consumers in anticipation of Window 10 support ending.
- Features and innovation also helped trigger replacements with AI-enabled features for smartphones and IT while other sectors such as domestic appliances and CE continued to see a slowdown due to market saturation and unclear AI use cases. However, niche segments continued to grow.
- Average prices and value growth outperformed volume in most sectors with premium segments being more resilient during uncertainties.

Channel Dynamics

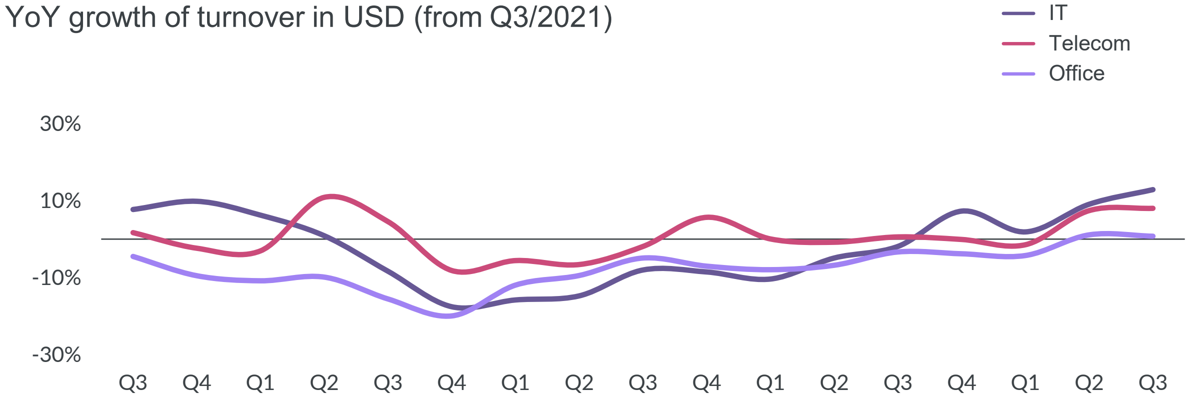
- Offline channels mostly returned to pre-pandemic levels, while the contribution of online channels stabilized. Growth in overall T&D is all-encompassing across both offline and online channels.

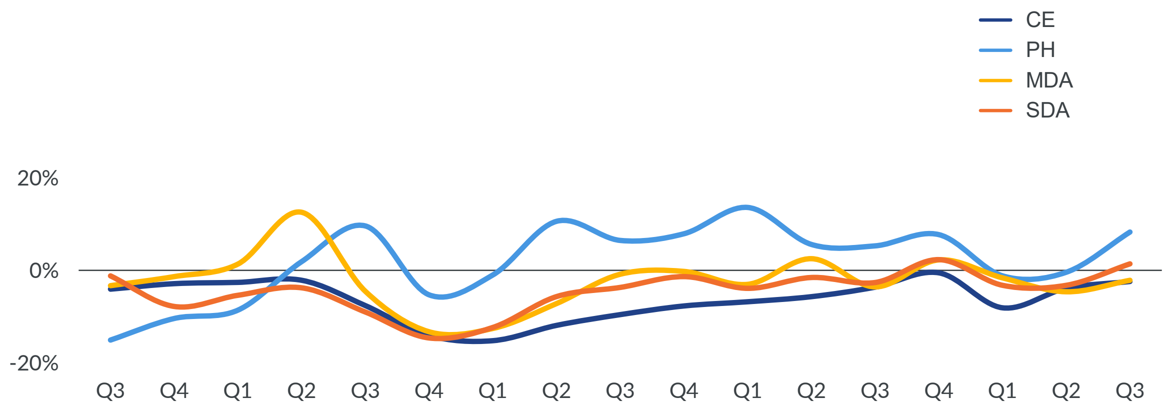
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office | APAC ex CN: AU NZ HK ID IN JP KH KR MM MO MY PH SG TH TW VN

Helicopter View APAC ex China

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

YoY growth of turnover in USD (from Q3/2021)





Growing & declining product segments

- The IT sector continued to see healthy growth driven by replacement of PCs following the end of the support for Windows 10. Gaming and AI compatibility remained being key segments.
- The telecom sector showed strong growth with strong flagship launches and focus on AI-enabled features. The sector witnessed recovery after 2 years of decline with average prices shifting upward from mass segments to higher price tier flagships.
- MDA declined due to a high base in air conditioner sales last year, brought about by heat waves while this year's weather was more stable. The sector is challenged by saturation.
- The CE sector continued to decline across most markets due to high penetration levels. Niche segments outperformed the market such as mini-LEDs in TV, open ear headphones, and party speakers within mini-Bluetooth speakers.
- SDA declined across several categories, including vacuum cleaners, air treatment, and hair care. In contrast, electric fryers remained a standout category showing continued growth with growing health trends in cooking.
- Photo rebounded in Q3 after a decline driven by fixed lens camera and non-full-frame compact camera pushed in online campaigns with influencers and social media marketing.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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

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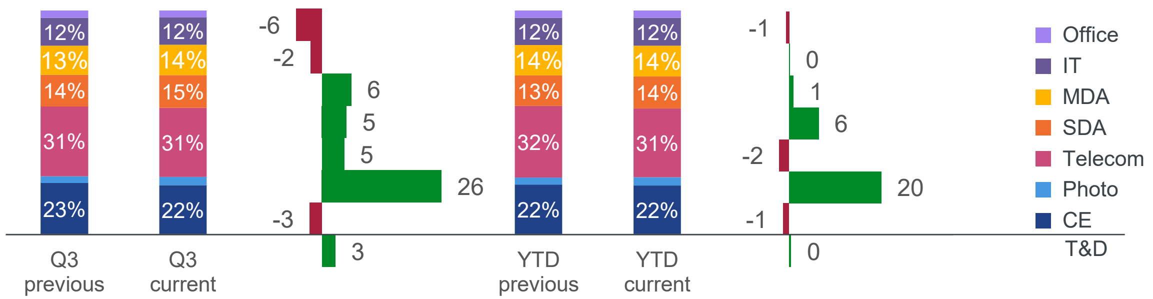
Helicopter View Australia

Australia

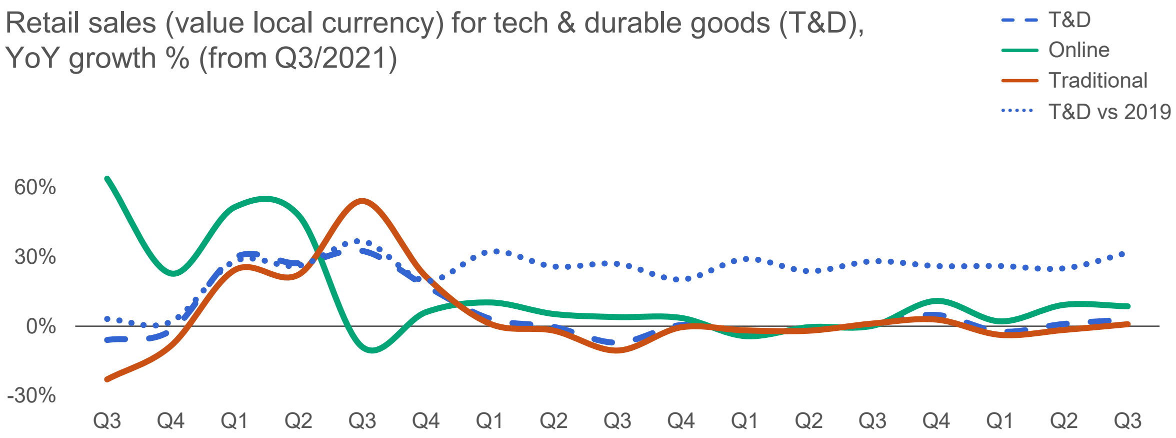
Contact person: **Brendan Dowd** (MI Lead)

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 Q3/2021)



Key Insights

- Q3 2025 saw the overall T&D market contract in volume (-0.3%) yet value grew (+3%), which reflects the fact that consumer confidence is rising again and so, too, (concerningly) inflation.
- The largest sector, telecom, finally returned to growth (+5%), as demand for smartphones steadily turns, further buoyed by similar growth for wearables (+5%). Consumer electronics, however, slipped back from flat last quarter to -3%, dragged by smart speakers, soundbars, and radio devices, all recording double-digit declines.
- Photo doubled its rate of annual growth this quarter from +13% in Q2 2025 to +26% in Q3 2025. All categories within contributed to this, but most significant was interchangeable lenses (+37%).
- Small domestic appliances continued to outperform the average (+6%), led broadly by personal care and seasonal categories.

Channel Dynamics

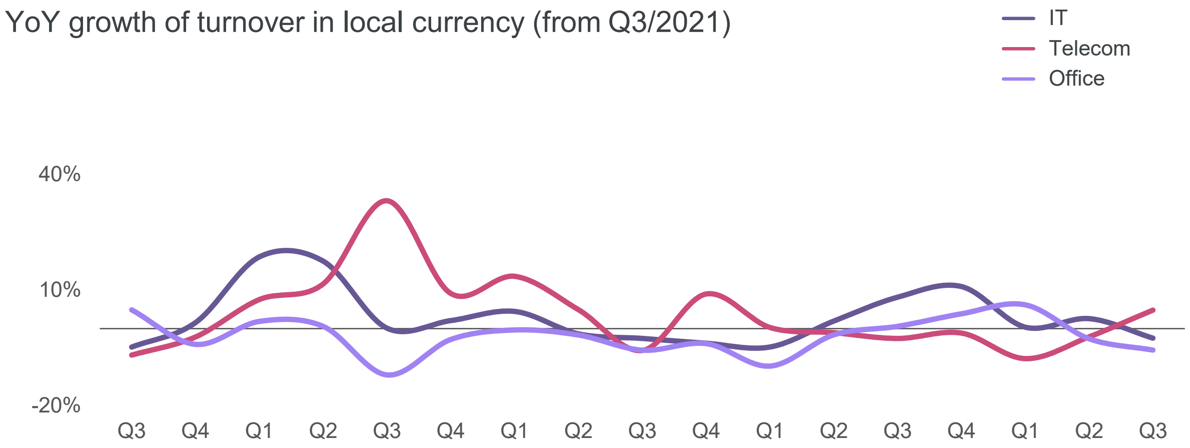
- The shift of volume toward the online channels continued as it had over the course of the past 4 rolling quarters (+9% vs +1%).

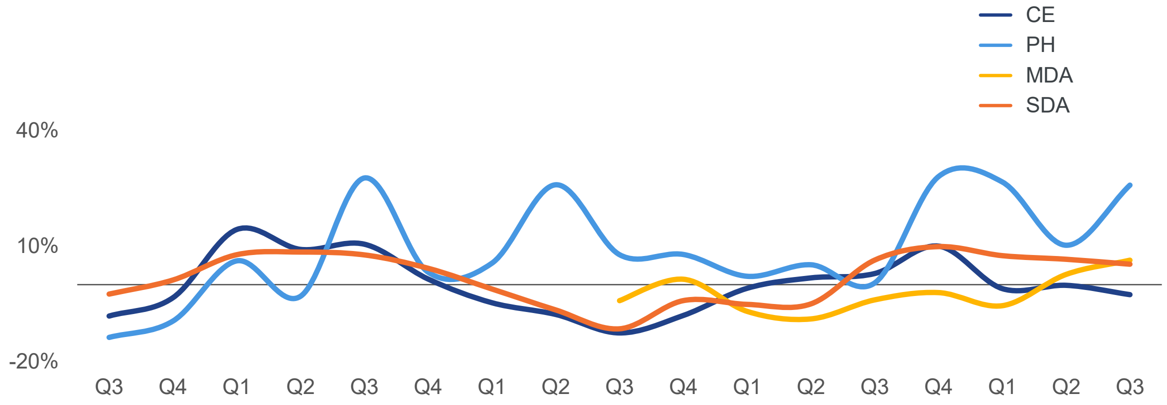
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office; online is tracked for SMP only - for further information please contact 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 Q3/2021)





Growing & declining product segments

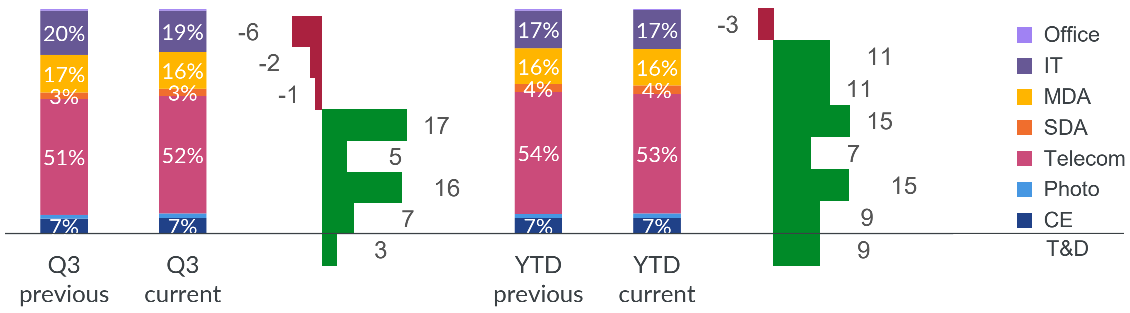
- The contraction of IT is attributable to 5 out of 7 categories. The largest category, media tablets, achieved some growth (+2%), but not enough to offset the overall sector decline.
- Smartphones ended the quarter with a 5% increase, a significant improvement given the slow start to the year. Wearables also matched this result (+5%), pulling telecom out of decline for the first time since Q1 2024.
- 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, mini-LED, and OLED.
- The long-term driver of growth in photo is mirrorless cameras. This continued in Q3 (+13%). Digital cameras were fueled further by fixed lens (+62%).
- MDA also returned to growth for the first time since Q4 2023, led by washing machines (+14%) across types, but particularly washer dryers (+31%).
- SDA's growth remained consistent (+5%), yet no longer led by its largest category, vacuum cleaners (-2%), but by fryers (+21%) and coffee machines (+11%). Also, strong output from personal care categories such as shavers (+28%) and hair stylers (+18%). A particularly cold winter drove up demand for electr. heaters (+53%).

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, 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

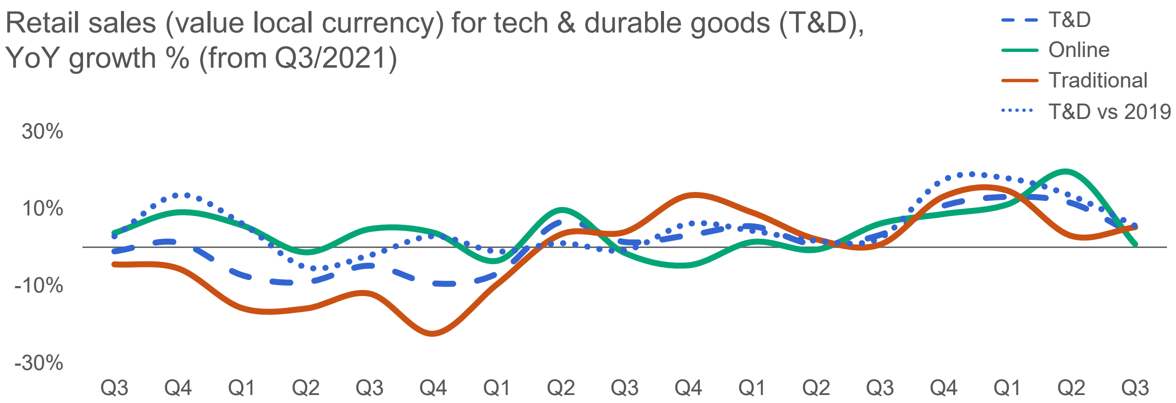
Helicopter View China

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 Q3/2021)



Key Insights

- Political stimulation effects started to weaken in Q3. YoY performance was greatly impacted especially for product groups which were eligible for the initial wave of government subsidies.
- Market growth for MDA paused and even showed slight decline in Q3 due to the high base from last year. Both cooling and washing machines decreased. However, emerging products such as dishwashers performed well and achieved double-digit growth.
- The TV market saw growth of 1% YoY in terms of value, driven largely by mini-LED TVs.
- The PC market in Q3 2025 exhibited a significant downward trend. Gaming laptops, which had benefited the most from the national subsidy policy, saw its first YoY decline after 5 quarters. Thin-and-light laptops and branded desktop PC also suffered.
- The photo market stretched its growth into Q3 and YoY, driven primarily by 1+FL and non-full-frame CSC products. Some new models featuring faster AI-based hybrid autofocus systems give consumers a balance between flexibility and affordability.

Channel Dynamics

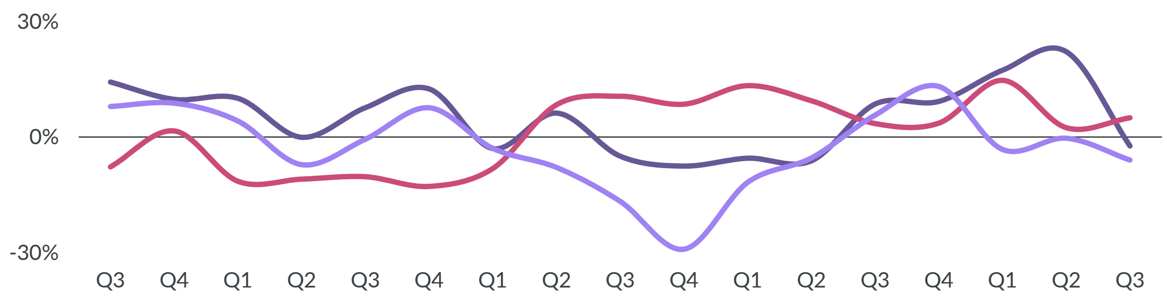
- Q3 experienced modest growth of 3%. Positioned between 6.18 and 11.11, it touched a low point of 2025. Online growth merely reached 1%. However, offline maintained growth of 5%, driven by the National Day holiday.

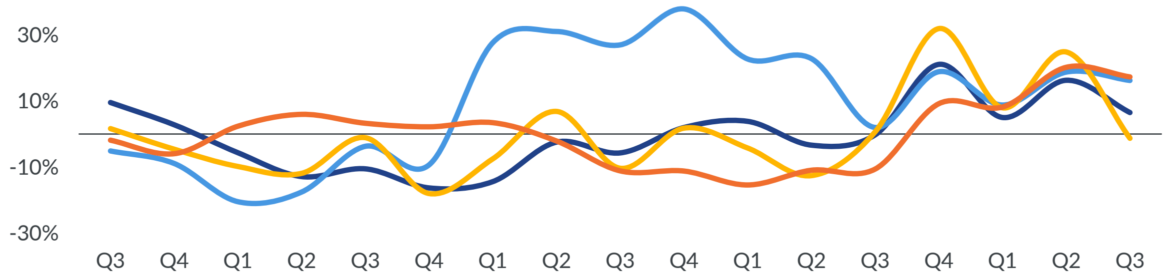
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View China

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

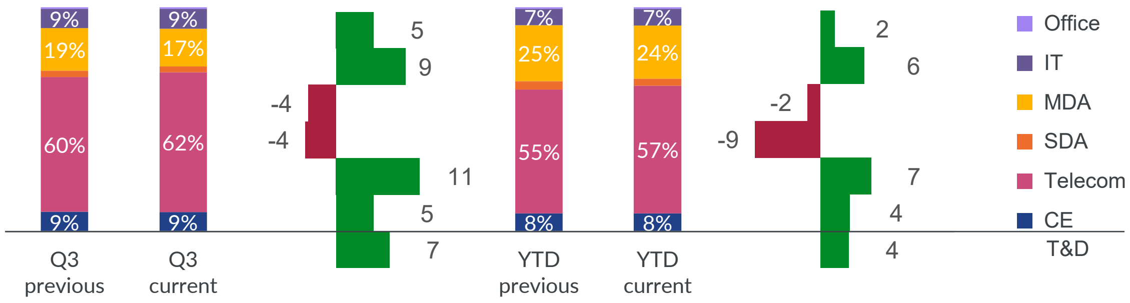
- Notable growth was recorded in 3 key segments: PTVs with screen sizes ≥80” (+31%), mid-range models priced between CNY 5-10K (+18%), and mini-LED TVs (+86%).
- The headset market reached 42 million in units (+2%) and 1.4 billion USD (+9%) in value. The average price remained at $33. It was the growing popularity of open-ear headset that pulled the units up (+7%) for true wireless.
- Even though subsidies availability dried off in Q3, smartphone sales revenue managed to register growth because of better sales from the annual flagship model launch by local brands and the Apple iPhone 17.
- Cooling and washing machines got additional benefits from national subsidies from August last year. With the weakening stimulus of subsidies, market growth became sluggish and showed a decline in September 2025.
- Hot beverage makers continued their robust expansion, mainly driven by online growth of coffee machines, with sales value surging by 55% YoY. Both full-automatic and semi-automatic espresso machines saw continued growth, particularly in the grinding sector. Products featuring advanced cold brew technology and smart functions (e.g., connectivity, touchscreens) remained key growth drivers.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

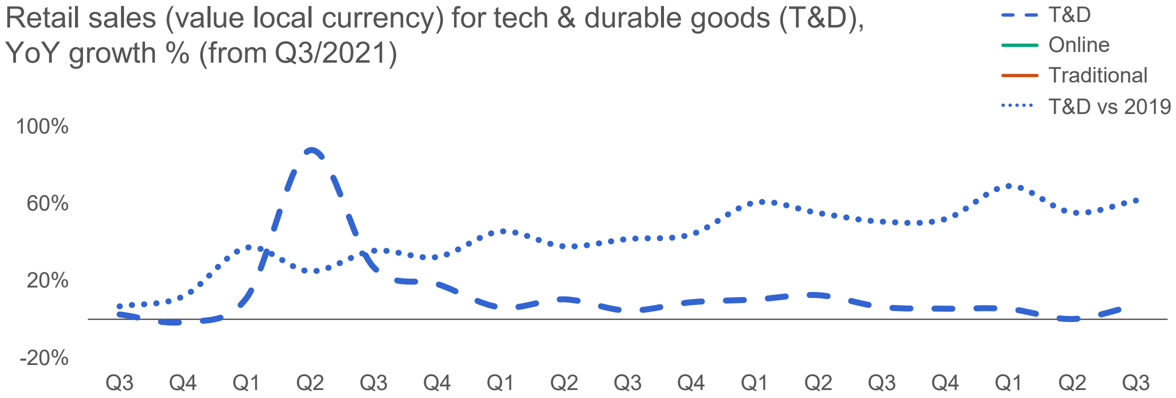
Helicopter View India

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 Q3/2021)



Key Insights

- The T&D sector registered a 4% value growth from January to September 2025, while volume growth remained flat, reflecting cautious consumer spending and subdued demand. The year so far has been challenging for the industry, marked by macroeconomic headwinds and shifting consumer priorities.
- GST 2.0 implementation drove an immediate uplift in weekly sales across all tracked categories in September 2025, signaling strong consumer response to tax changes. Festive weeks (Diwali) amplified this momentum, with peak sales observed in PTVs and smartphones, followed by laptops and food preparation appliances.

Channel Dynamics

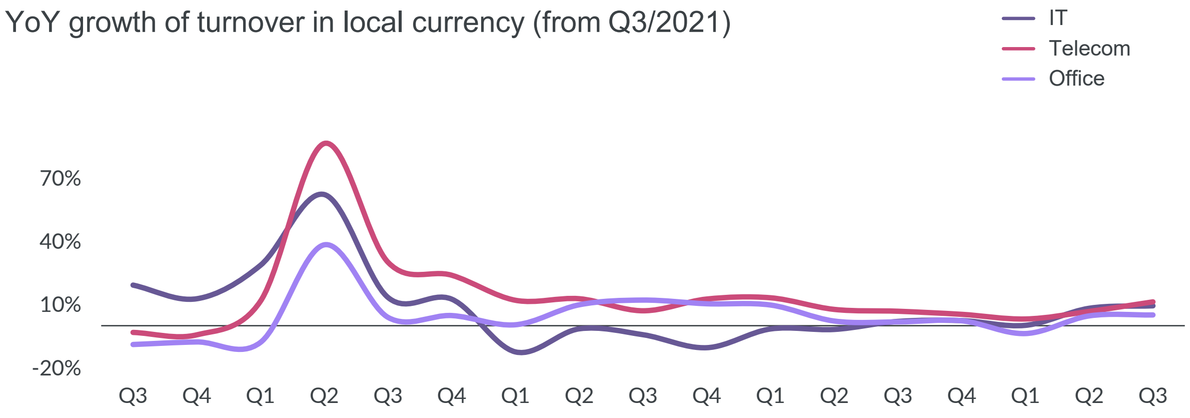
- The organized channel continued to gain momentum and witnessed growth even in declining categories like food preparation and water filters.
- Quick-commerce is gaining traction, especially for small-ticket items.
- Online platforms continued to gain share, especially during festive weeks, driven by convenience, discounts, and exclusive launches.

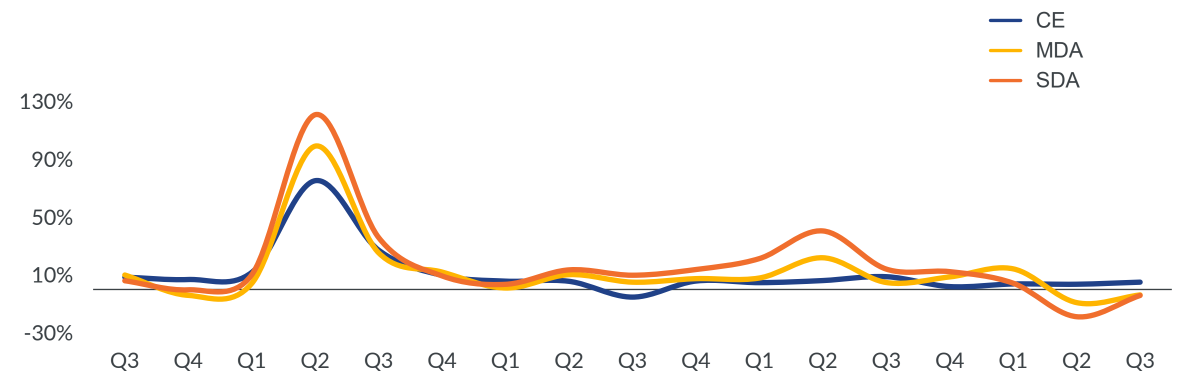
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE, Small/Major Domestic Appliances, Telecom, IT, Office; online in India is left out as measured differently than POS panel methodology - for more information please contact your local key account manager

Helicopter View India

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

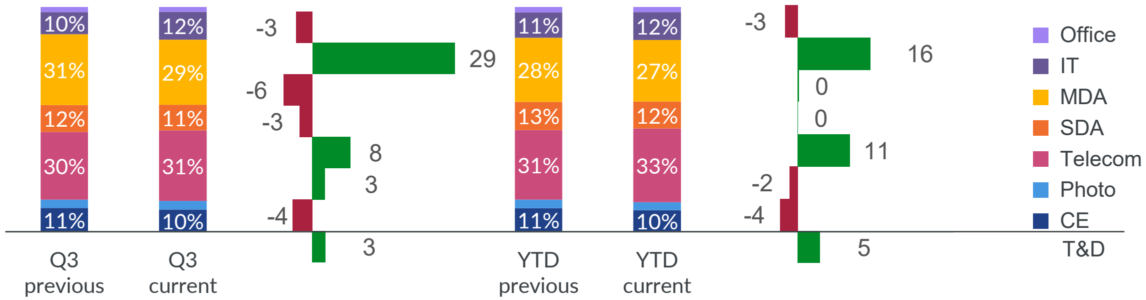
- Air conditioners and refrigerators continued to decline in YTD 2025 vs PY. However, washing machines showed positive momentum, further boosted by festive season demand.
- Air purifiers recorded strong growth with a 9% increase in volume and 11% in value. Water filters also performed well, growing 4% in volume and 2% in value. In contrast, key categories such as food preparation, irons, and air coolers continued to decline.
- Vacuum cleaners achieved 5% volume growth and a significant 21% value growth, driven by the rising popularity of robotic models, which offer higher margins.
- The IT category grew 5% in volume and 6% in value, led by laptops (+4% volume, +6% value) and monitors (+18% volume, +17% value).
- GST reforms boosted affordability and consumer confidence, leading to spikes in aspirational categories like electronics and appliances during implementation and festive weeks. Urban consumption surge and increased disposable income further supported growth in durables.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, 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

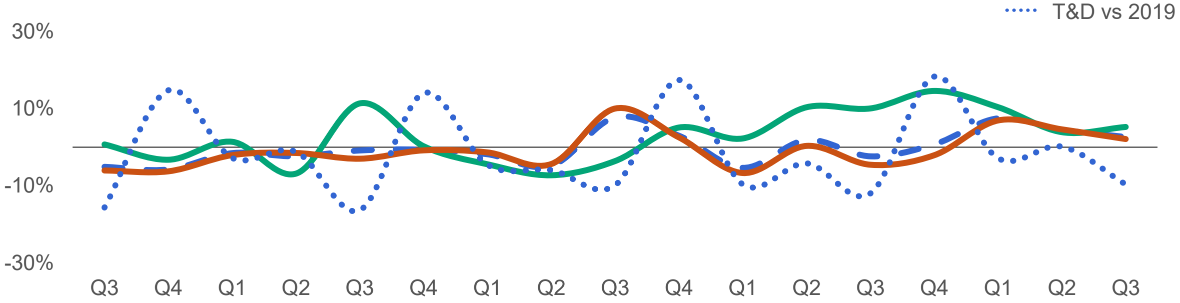
Helicopter View Japan

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 Q3/2021)



Key Insights

- Tech & Durables maintained growth in the third quarter, increasing by 3% year-on-year. PC sales surged by 29% YoY, driven largely by the approaching end of Windows 10 support, significantly boosting overall growth.
- Japan's Consumer Price Index (CPI) rose by 2.9% year-on-year in September 2025, up 0.2% points from the previous month (+2.7%). The increase was mainly driven by higher electricity and gas prices. In contrast, durable goods prices fell 3.3% year-on-year.
- Consumer Confidence Index rose by 0.4 points from the previous month, suggesting that consumer sentiment remains stable with signs of recovery. Willingness to purchase durable goods, one of the key indicators, increased by 0.8 points from the previous month.

Channel Dynamics

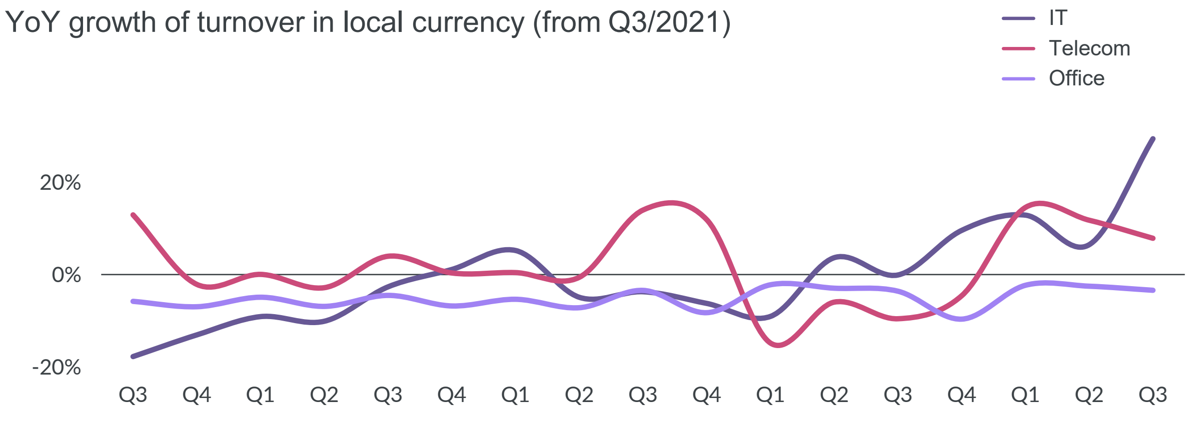
- The traditional channel experienced growth for three consecutive quarters now. Significant growth in PC sales drove this channel.
- The online market also performed strongly, exceeding the growth rate seen in Q2. Like in the traditional channel, PCs as well as audio and imaging, performed well.

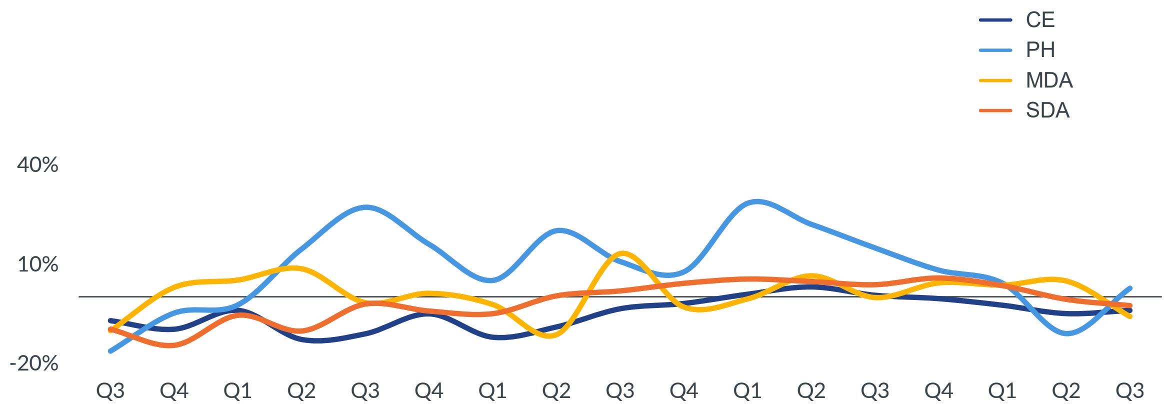
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Japan

Japan
Contact person:
Saori Arai
(MI Lead)
Saori.Arai

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

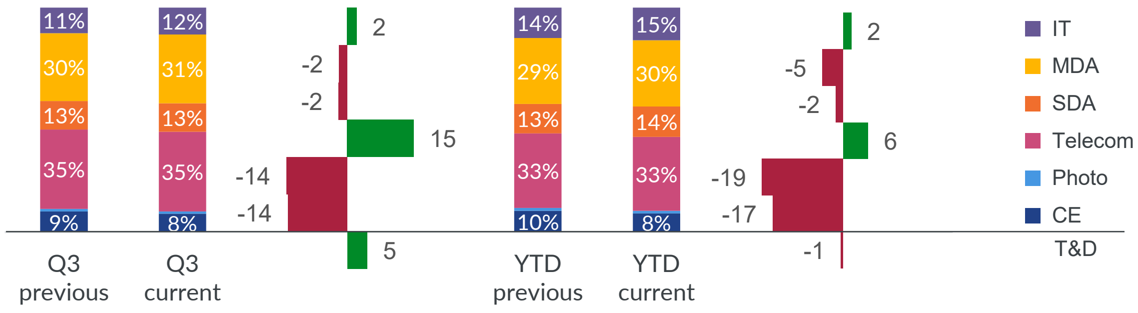
- In the IT sector, the imminent end of support for Windows 10 significantly stimulated demand in the PC category, with particularly notable market growth in traditional sales.
- The telecom market continued to grow, driven by strong sales of new products. Sales of high-end models priced above 100K JPY were especially strong, significantly exceeding YoY.
- The OE sector saw only a slight decrease from last year due to a decline in demand for printers.
- The CE market showed a slight decline YoY. TV sales decreased due to a drop in both sales units and average prices. The audio market performed well, supported by growing both true wireless and open-ear models.
- The photo market, while high-priced products underperformed, low-priced products sold well, resulting in a slight increase in sales.
- The MDA market saw a YoY decline in Q3 as a reaction to the rise in temperatures in Q2 causing air conditioner sales to surge earlier than usual.
- In the SDA market, sales in all sectors, including cooking, household, and hair and beauty/health appliances, decreased compared to the previous year.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

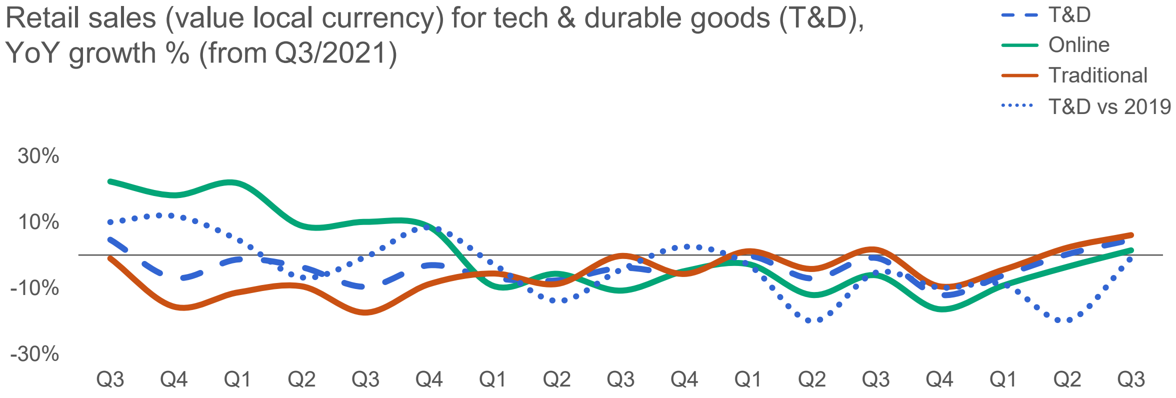
Helicopter View South Korea

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 Q3/2021)



Key Insights

- The IT sector experienced continuous growth denoting that the industry finally entered the era of stable recovery. This new era was ushered in by growth across diverse products.
- Telecom grew by 15% YoY in Q3, driven by a 22% increase in core wearables and a 15% increase in phablets.
- The photo and CE sectors continued to experience negative trends both showing -14% in Q3 YoY. Most key categories remained in a prolonged decline, with only microphones in CE and camcorders in photo showing positive development.

Channel Dynamics

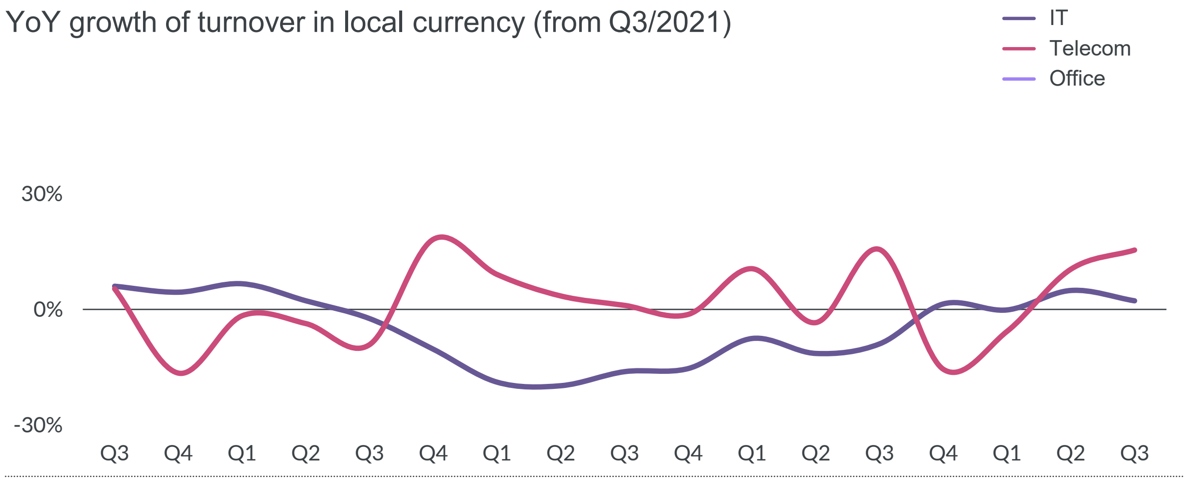
- In Q3 2025, the T&D market returned to positive YoY growth across all channels. Online and offline segments performed at nearly the same level, a clear shift from Q3 and Q4 2024 when online significantly outpaced offline.
- Despite this improvement, the market remained below pre-pandemic benchmarks, as growth versus 2019 continued to be negative, indicating that full recovery has yet to be achieved.

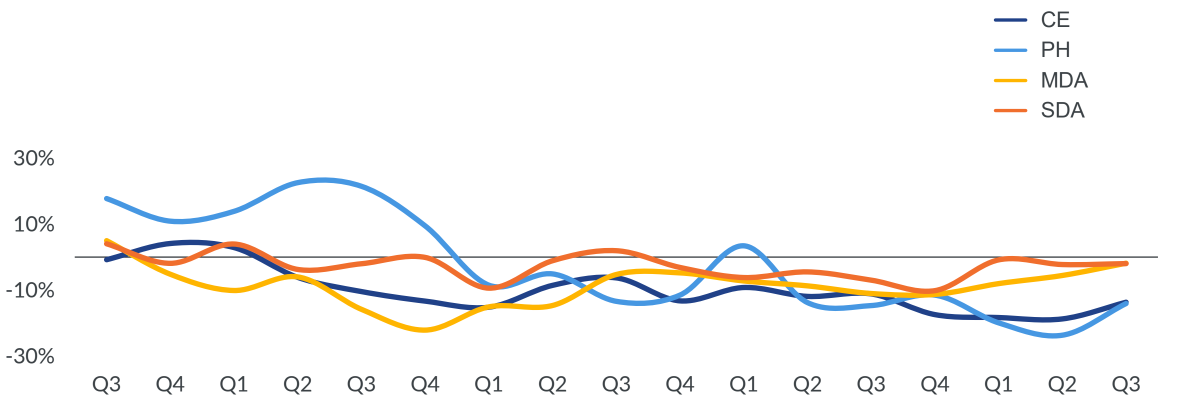
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View South Korea

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

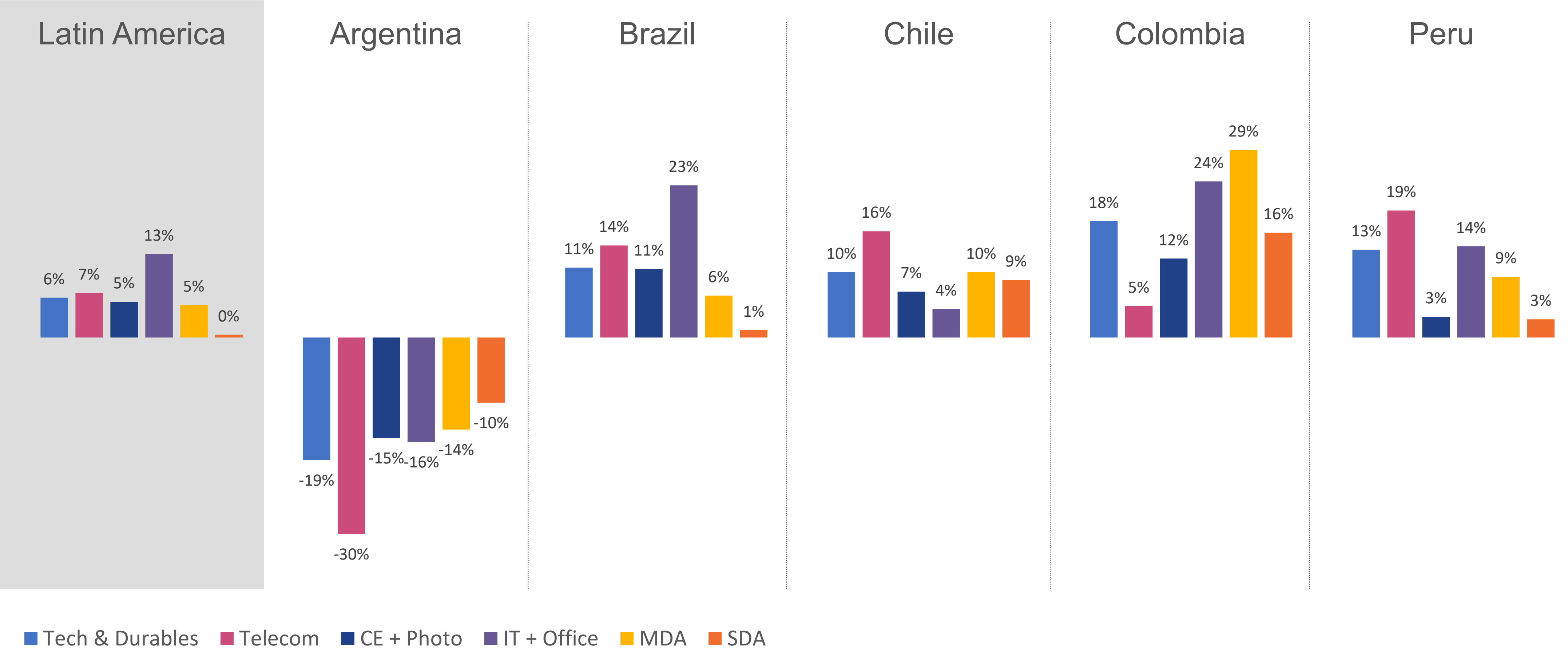
- Growth was observed across products such as PC hardware, peripherals, and tablets. The most intriguing part is that growth in the IT industry was mainly driven by the gaming segment with gaming tablets showing the most robust growth in triple digits, reshaping the small-tablet market (display size <9”).
- The continued decline in CE and photo sectors reflects overall market saturation, with no breakthrough innovations emerging to reverse the trend. While some growth was observed among low-cost brands, the absence of strong market leaders resulted in ongoing quarterly contractions.
- Samsung's sales increased by 23% YoY due to strong sales of the Samsung Galaxy Fold 7, released in July. The iPhone 17 series, released in September, showed similar sales YoY, leading to a 15% increase in phablets sales.
- In SDA, beauty-related categories such as hair dryers, hair stylers, garment steamers, and irons showed notable growth in Q3. Due to the YoY contraction in robot vacuum sales, demand for vacuum cleaners and steam cleaners showed declines. Kitchen appliances with advanced technologies, such as fryers, water filters, and food waste disposers, delivered growth.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

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

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

USD growth % YoY Q3/2025



Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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

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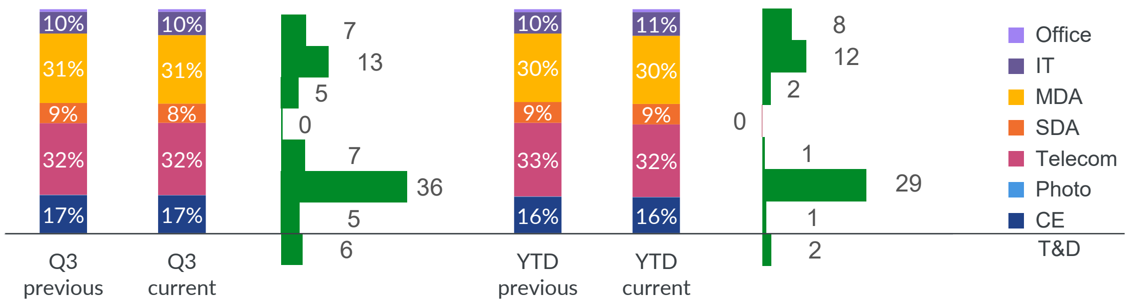
Helicopter View Latin America

Latin America

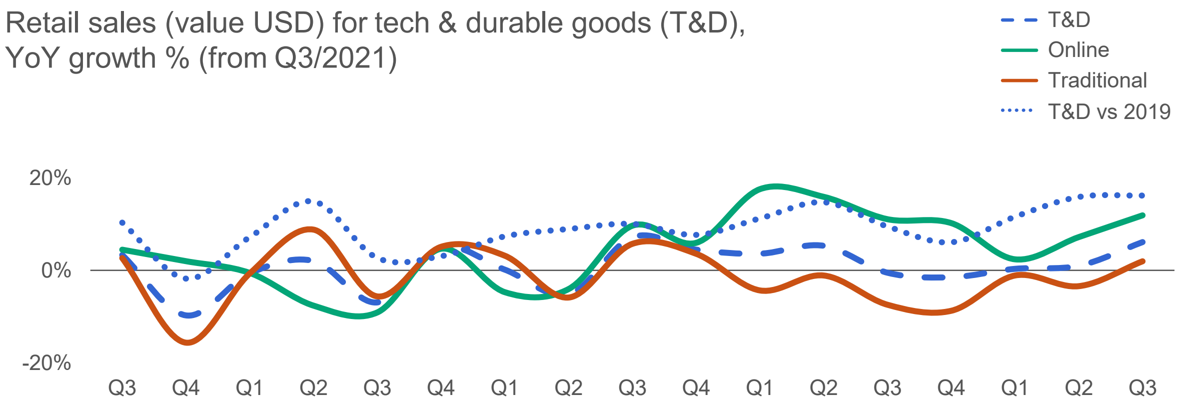
Contact person:
Rui Agapito
(CSM T&D Lead)

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 Q3/2021)



Key Insights

- In Q3, the market slowed down a bit but continued with a positive performance.
- Argentina remained the country that was contributing the most to this increase.
- The IT sector continued to be a highlight for Tech & Durables in 2025.

Channel Dynamics

- Online continued the positive increase and pushed demand.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), USD value & growth Q3/2025 vs Q3/2024, 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

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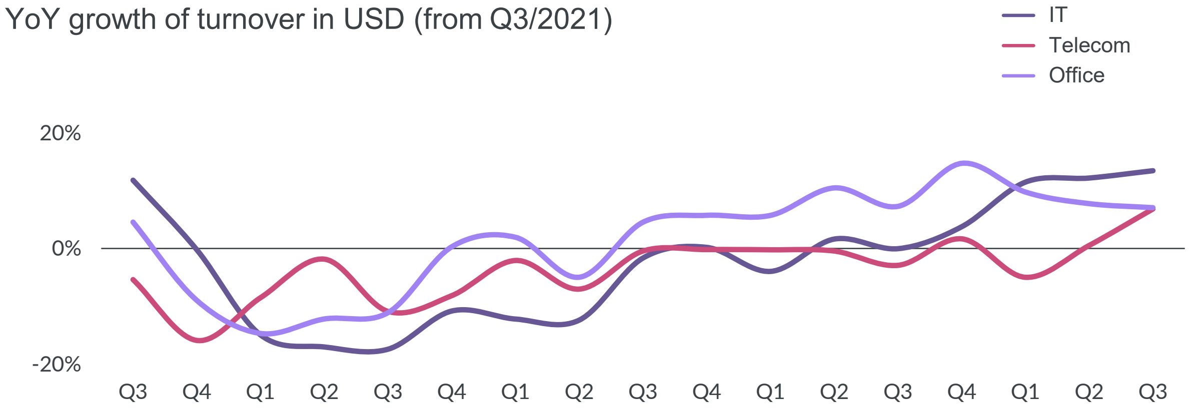
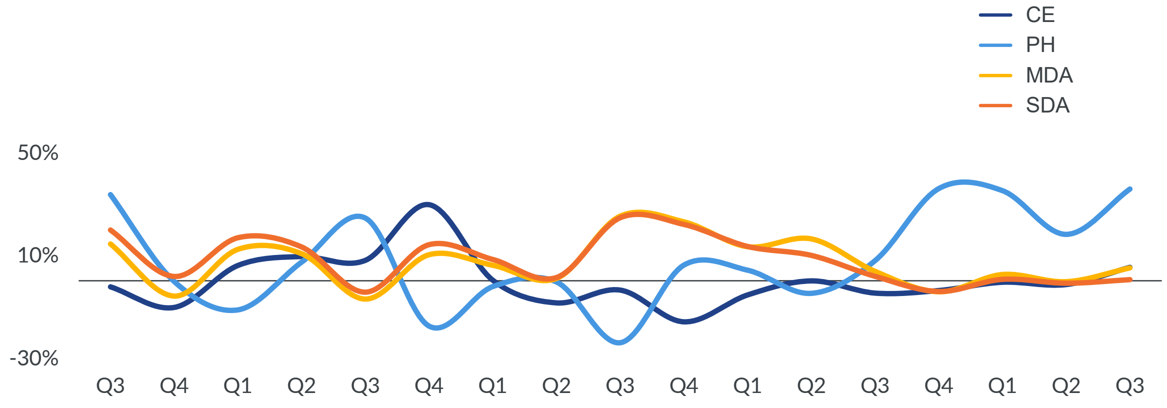
Helicopter View Latin America

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

YoY growth of turnover in USD (from Q3/2021)





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.
- The CE market remained flat. Larger screen TVs continued to drive the market, and there is high expectation for year-end promotions, already considering the World Cup next year.
- Domestic appliances maintained their growth overall. Key product groups such as washing machines and refrigerators continued to drive growth, but complementary domestic appliances 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 Q3/2025 vs Q3/2024, 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

- World
- Western Europe
- Eastern Europe
- Middle East, Turkey & Africa
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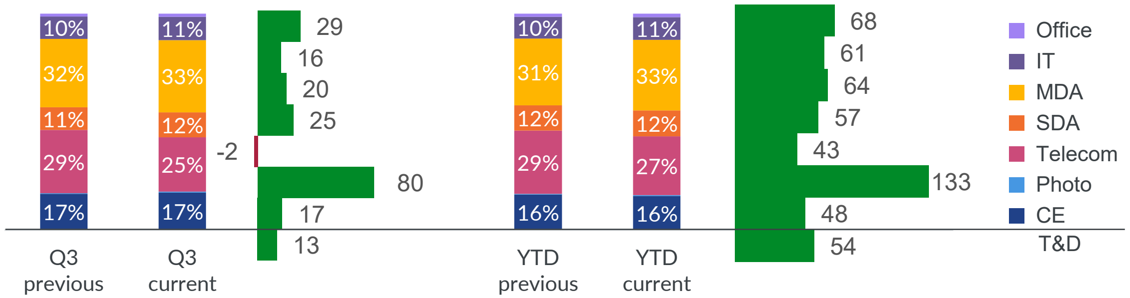
Helicopter View Argentina

Argentina

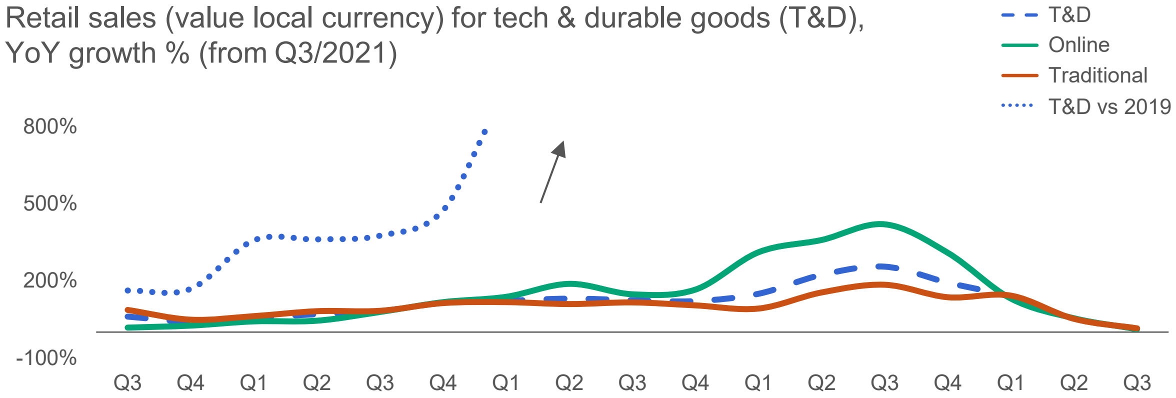
Contact person:
Brenda Marengo
(Sr Specialist CSM)

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 Q3/2021)



Key Insights

- In Q3 2025, the market saw a 13% increase in value compared to the same quarter in 2024.
- In terms of units, total market volume also grew by 13% YoY. Looking at year-to-date performance, the market expanded by 29% vs YTD 2024.
- Throughout the year, the photo, office, MDA, and IT sectors outperformed the market average, showing the strongest growth. In contrast, the SDA, CE, and telecom sectors posted more moderate gains.
- It is also worth noting that Argentina's inflation rate for the January to September 2025 period was 22%.

Channel Dynamics

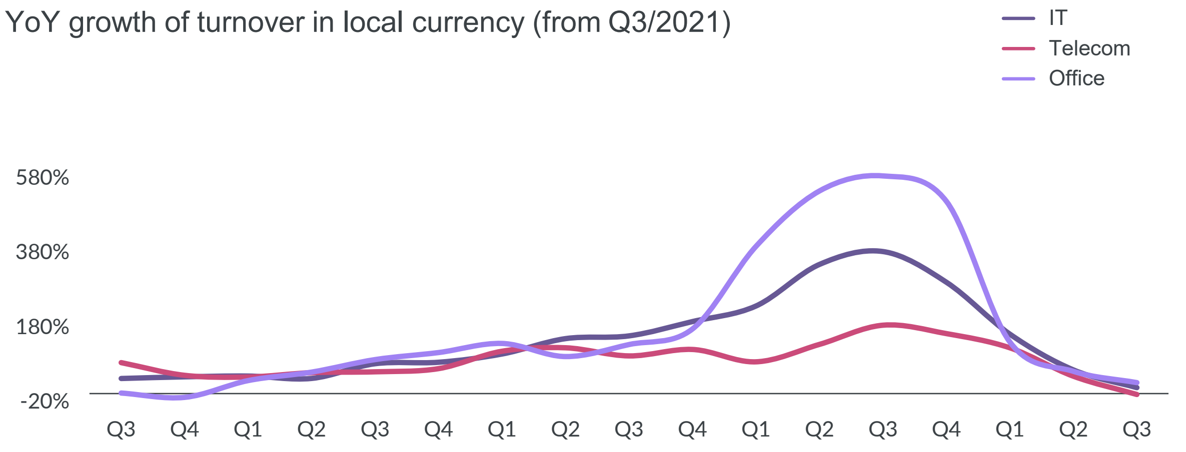
- Both online and offline channels recorded declines compared to previous quarters of 2025. This trend is largely explained by the fact that Q3 does not include major promotional events, unlike earlier quarters that benefited from such activities.

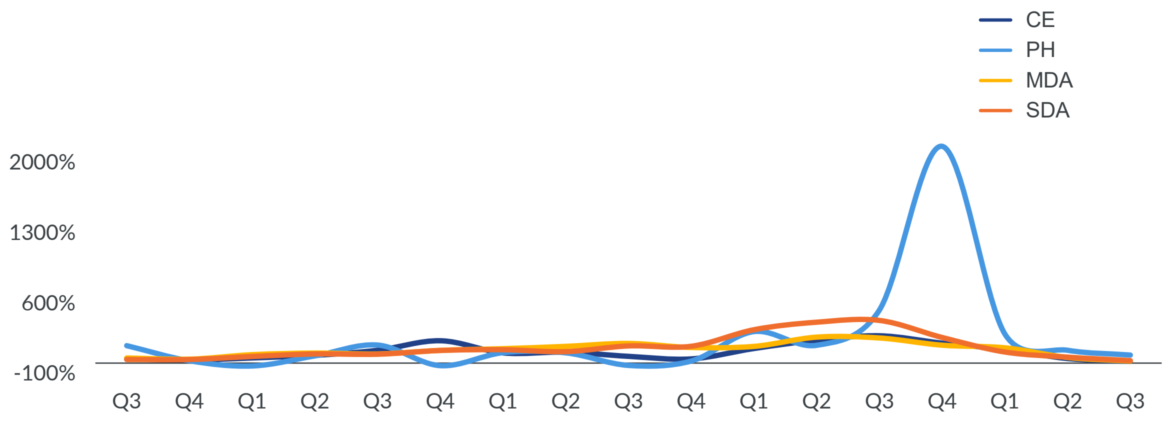
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Argentina

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- In Q3, all sectors posted significantly weaker growth compared to previous quarters, continuing the downward trend observed in Q2.
- For YTD 2025, sales value remained highly concentrated, with smartphones accounting for 25% and nine other key categories representing 51%. The remaining 25% was distributed across a long tail of smaller categories.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

World
Western Europe
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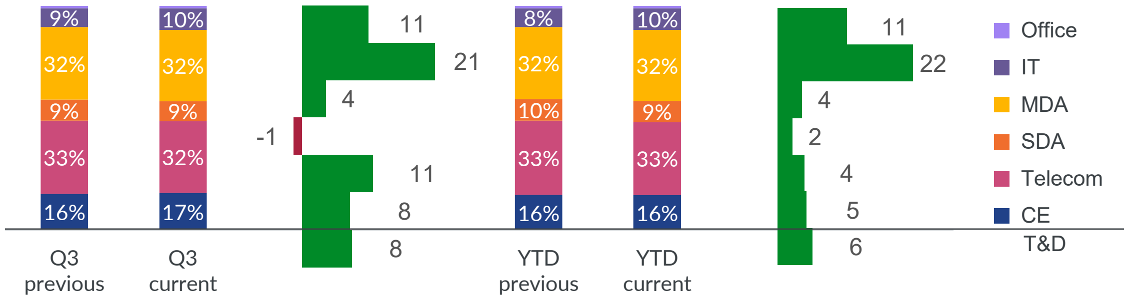
Helicopter View Brazil

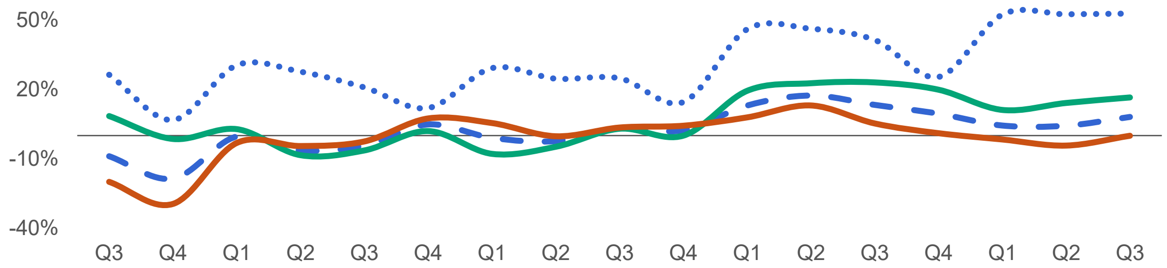
Brazil

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 Q3/2021)



Key Insights

- 6% YTD growth for T&D was strongly linked to IT and telecom.
- Telecom showed slight growth, driven by headsets and headphones in both units sold and revenue, while smartphones showed a 1% decline in units YTD, but a 3% increase in revenue.
- IT continued with its strong growth trend, driven by monitors, media tablets, and desktop computing. Tablets and desktops are gaining traction as preferred options for first-time purchases.
- In SDA, the performance of food preparation and floor/surface cleaning stood out.
- The top 3 MDA categories cooling, washing machines, and cooking drove growth, contributing with an additional R$840 million in revenue QoQ, reinforcing the positive trend observed in previous quarters.
- TVs drove the sector's results, with growth of 6% in Q3 and 3% in YTD. Within audio, loudspeakers stood out positively, with double-digit growth in both period comparisons.

Channel Dynamics

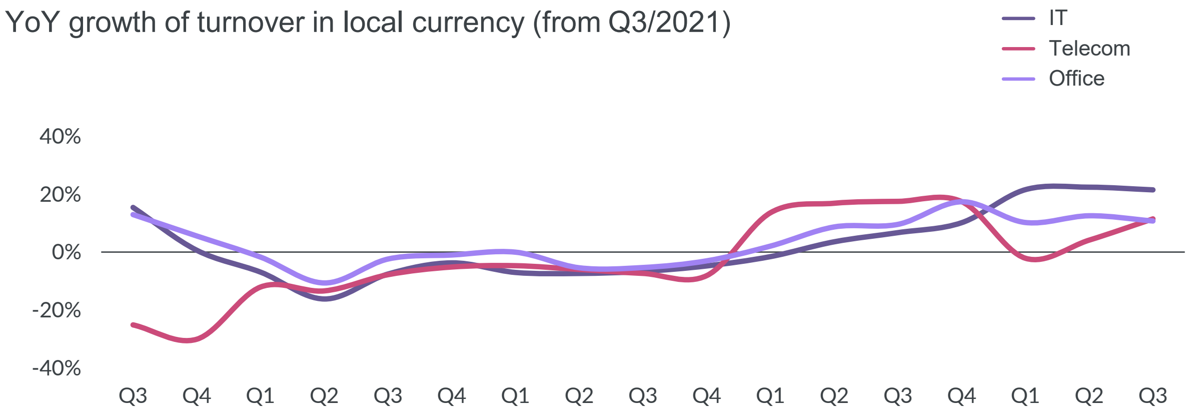
- The online market consistently outperforms in Brazil, now growing in similar trends as pre-pandemic levels.

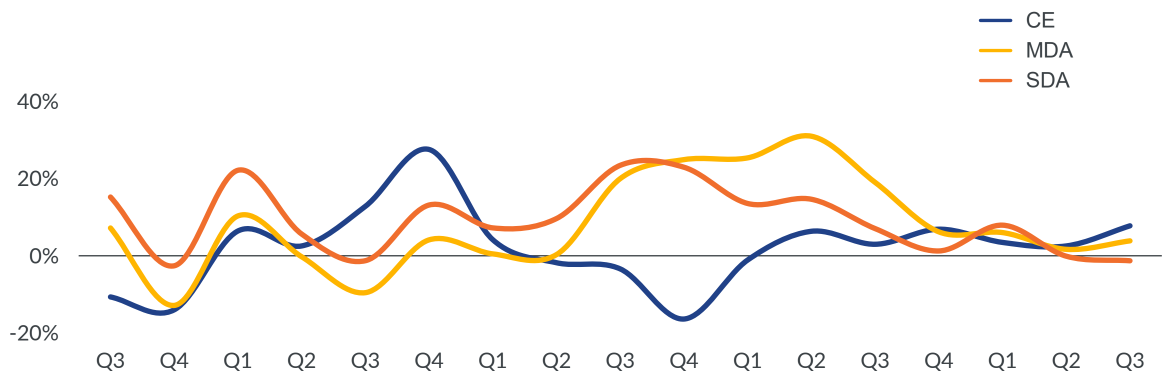
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Brazil

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- Mobile computing grew 0.5% in units, with aggressive price increases of 13.4% compared to last year. This opened opportunities for entry-level replacements with media tablets, which were up 27% in units, and desktops at +13%.
- Smartphones saw revenue growth driven by price increases and the expansion of the premium segment (>R$3.000), which was up 6.5% in revenue compared to the YTD of 2024.
- In food preparation, there were two products groups that contributed positively: liquidisers (+10% YTD 2025 vs 2024) and hand blenders (+38%).
- Within vacuum cleaners (+9% YTD 2025 vs 2024), hand stick and W&D make up 54% of the total market in terms of units and the share of handheld went up from 3% (YTD 2024) to 7% (YTD 2025).
- Value growth of cooling reached +12% QoQ, with an additional R$450 million in revenue. Air conditioners dropped by 14%, due to lower average temperatures, a direct effect of La Niña.
- TVs with displays larger than 50" grew in both Q3 and YTD, increasing this segment share within the category.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

- World
- Western Europe
- Eastern Europe
- Middle East, Turkey & Africa
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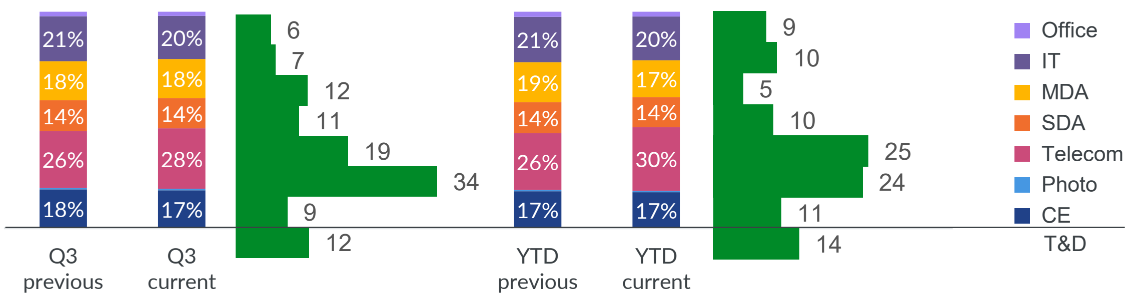
Helicopter View Chile

Chile

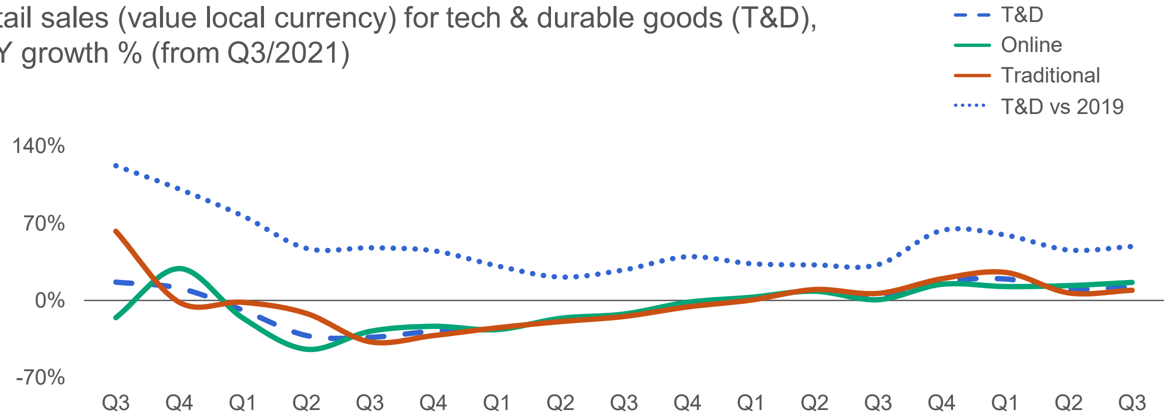
Contact person:
Juan Carlos Montes
(MI Lead)

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 Q3/2021)



Key Insights

- During the third quarter of 2025, the Tech & Durables market continued to show strong performance, maintaining the positive trend observed throughout the year. This momentum was largely driven by the outstanding results in telecom, as well as key home categories such as MDA and SDA.
- Although the third quarter is typically the least impactful quarter of the year, it played an important role in sustaining growth and even surpassed the performance of the second quarter.

Channel Dynamics

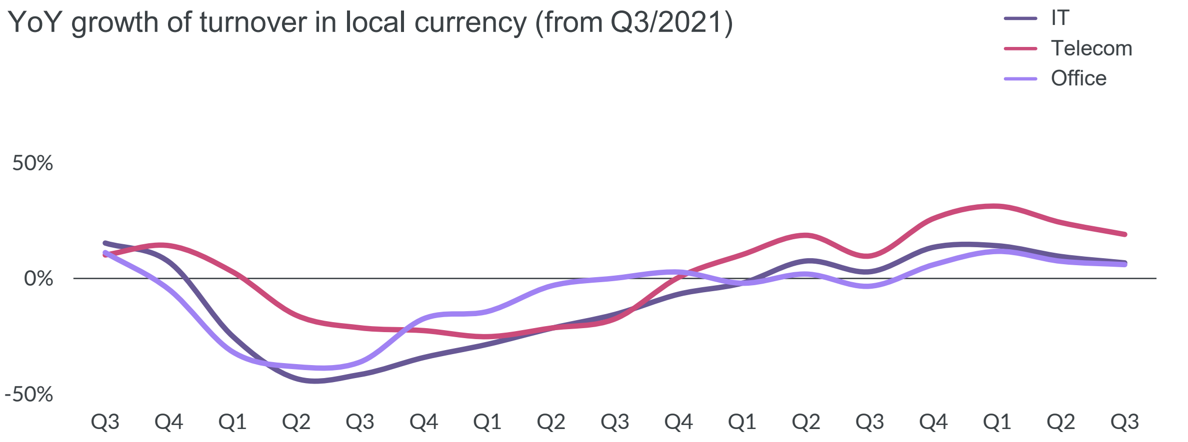
- Digital channels, after the second quarter, continued to grow faster than physical stores. This was driven by the contribution of marketplaces, which are increasing importance in the Chilean market and grew by +40% in Q3.
- Although physical stores did not grow as fast as digital channels, they remained stable with a +7.5% growth, which contributed to the recovery of the market in Chile.

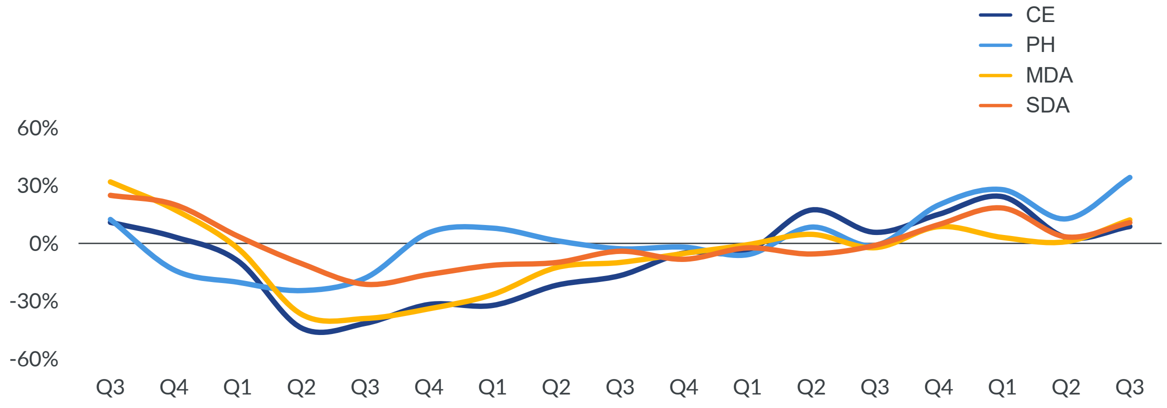
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Chile

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- The shift in brand mix toward more premium price points enabled value growth in the IT sector, offsetting the decline in category units. Leading players focused on expanding through new channels such as marketplaces.
- Telecom grew by +19% in Q3, confirming the category's dynamism even during Chile’s traditionally slowest period of the year. Although growth was lower than in Q2, it remained in double digits. The strong overall market performance stood out, along with Honor’s entry and the launch of the iPhone 17.
- CE grew by 11% in Q3. TV and audio performed well, especially PTV, which rebounded after a weak Q2. This recovery was achieved with a price drop of 12%, reflecting strong market competition. Samsung and LG adjusted their pricing to compete with Chinese brands like TCL and Hisense.
- After growth close to +2% in H1, MDA showed a strong recovery in Q3 with a +12% increase, driven by the strong performance of washing machines and cooling, along with a notable rebound in tumble dryers, which grew by +15%.
- The SDA market showed positive performance in value and units. Personal care and hot beverage makers led growth, while home climate categories declined due to milder weather. Despite gains, results fell short of the overall durable goods industry average.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

World
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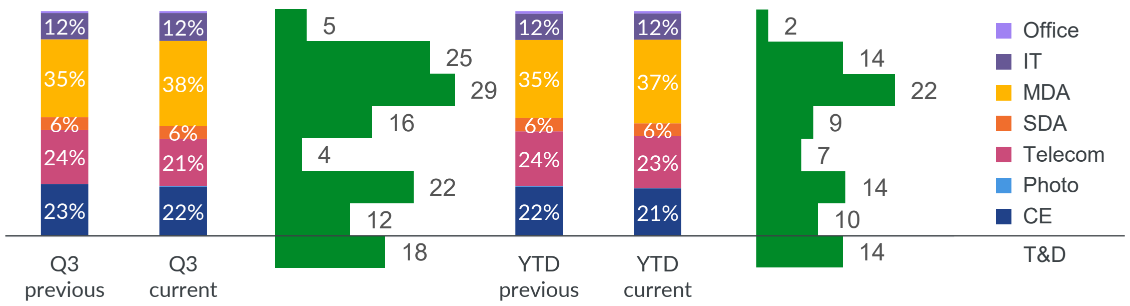
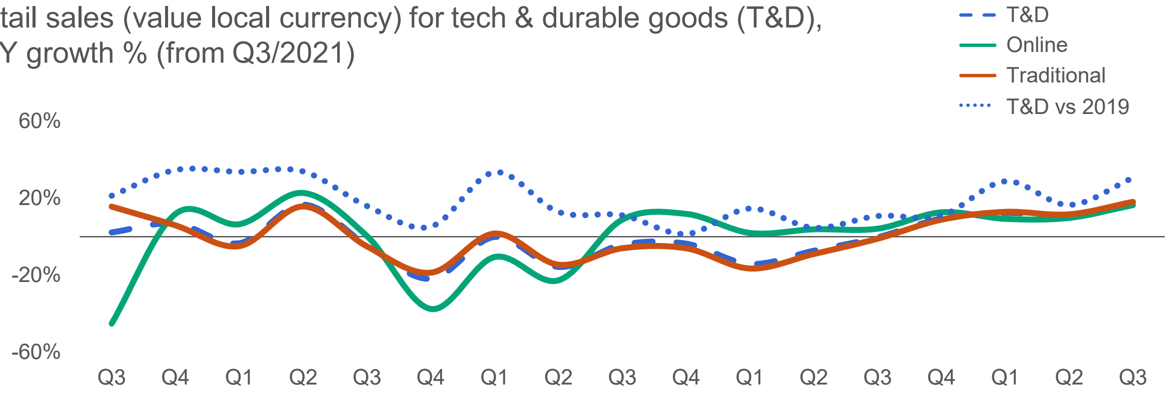
Helicopter View Colombia

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 Q3/2021)



Key Insights

- In Q3, Colombia continued to show stronger growth in terms of value than in terms of units, both versus Q2 and YoY. This trend was driven by three major promotional events: the mid-year bonus season, "Agosto Alkosto" – the country's largest retail event – and the "Feria del Hogar", which boosted performance in the specialized channel. The average ticket value increased nationwide, with Cundinamarca and the Pacific region leading growth. By sector, the rise in pricing was mainly driven by consumer electronics and IT.

Channel Dynamics

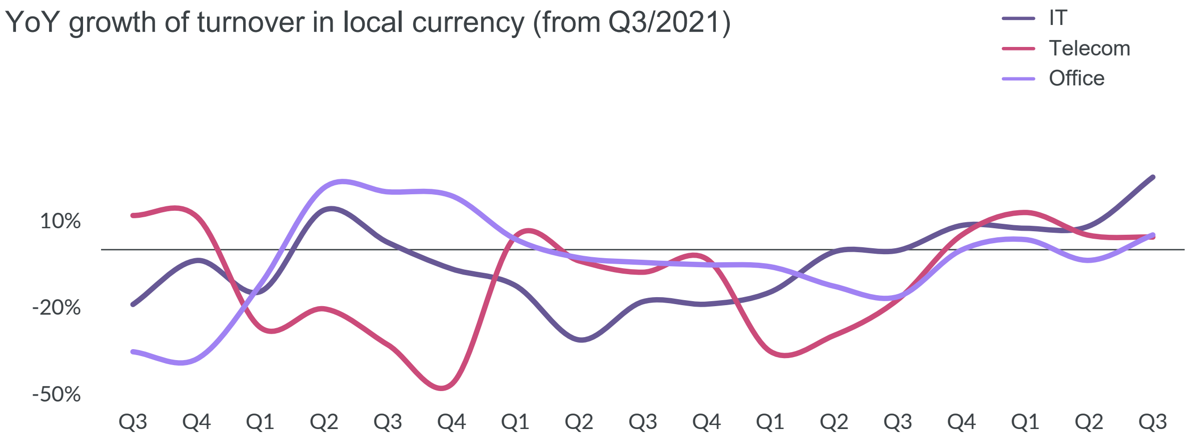
- Modern retail continued to drive value growth in 2025 and showed the highest increase in unit sales vs Q2. However, the specialized channel delivered stronger growth YoY.
- IT and CE gained relevance across both channels. In the specialized channel, these sectors took share from MDA, which grew but at a slower pace. In the modern channel, MDA gained relevance alongside IT and CE, while smaller sectors such as telecom and automotive lost share.

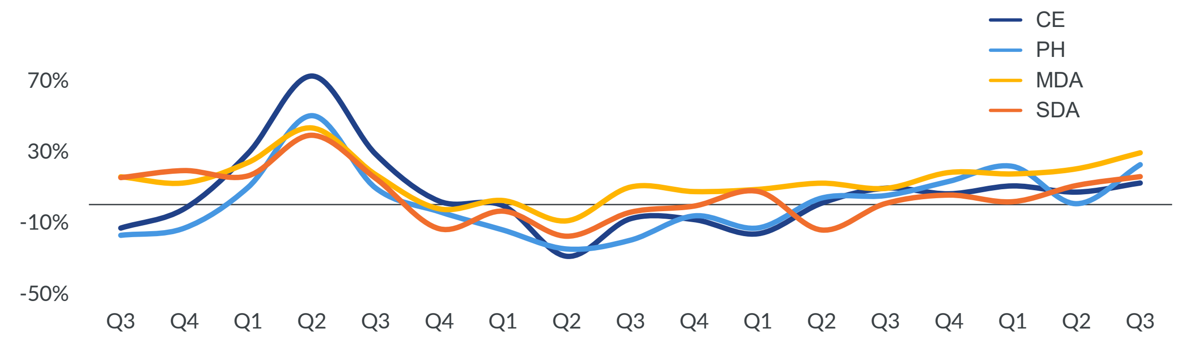
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Colombia

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

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- CE is the second fastest-growing sector, driven by PTV, AHS, and loudspeakers, with strong performance in offline sales and the CES channel. Price growth was evident, especially vs Q3 2024. PTV represents 86% of total CE sales, but in regions like Cundinamarca and the online channel, its share is lower, with audio categories gaining relevance.
- MDA grew 18% in value vs Q2, slightly above unit growth (18%). Compared to Q3 2024, unit growth (32%) outpaced value (30%), driven by Cundinamarca and Pacific regions. Key drivers: washing machines (in MM channel), air conditioners (in CES channel), and microwaves. Only washing machines increased in price vs Q2, while all categories show price growth vs 2024.
- SDA showed balanced growth in both value and units compared to Q2, mainly driven by Central Colombia, Cundinamarca, and the Pacific region. However, pots & pans and shavers were the only categories showing a decline vs Q2.
- IT was the fastest-growing sector, with all product groups showing positive trends. Notably, media tablets and desktop computing grew above average compared to both the previous period and the previous year. Mobile computing showed above-average growth vs Q2, while video game consoles stood out in YoY comparison.

PREV NEXT

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

World

Western Europe

Eastern Europe

Middle East, Turkey & Africa

APAC

Latin America

Argentina

Brazil

Chile

Colombia

Peru

PREV NEXT

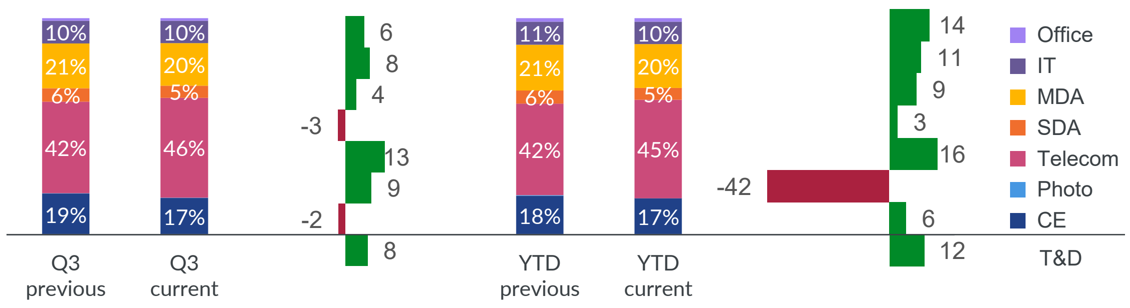
Helicopter View Peru

Peru

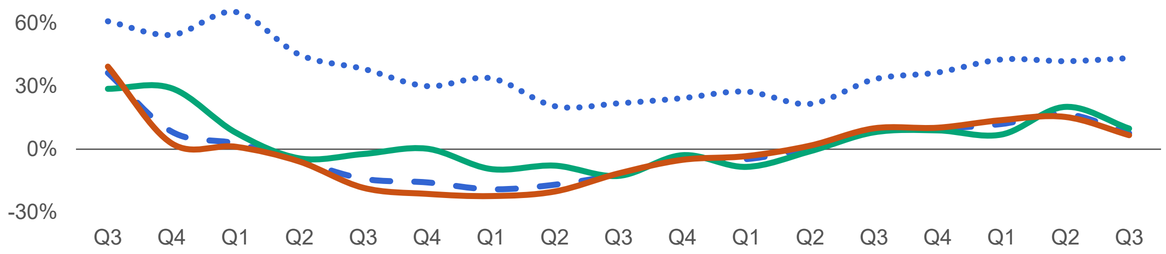
Contact person:
Adriana Tellez
(MI Lead)

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 Q3/2021)



Key Insights

- During the third quarter of 2025, the Peruvian market maintained its positive trajectory, achieving a growth rate of 8%. Telecom led the expansion with an increase of 13%, followed by IT at +8%. In contrast, SDA and CE registered declines of 3% and 2%, respectively.
- This performance remained aligned with the country's improving macroeconomic indicators, with GDP projected to grow by around 3.0% in 2025 and inflation currently close to 2.5%, staying within the Central Reserve Bank of Peru's target range (1% to 3%).

Channel Dynamics

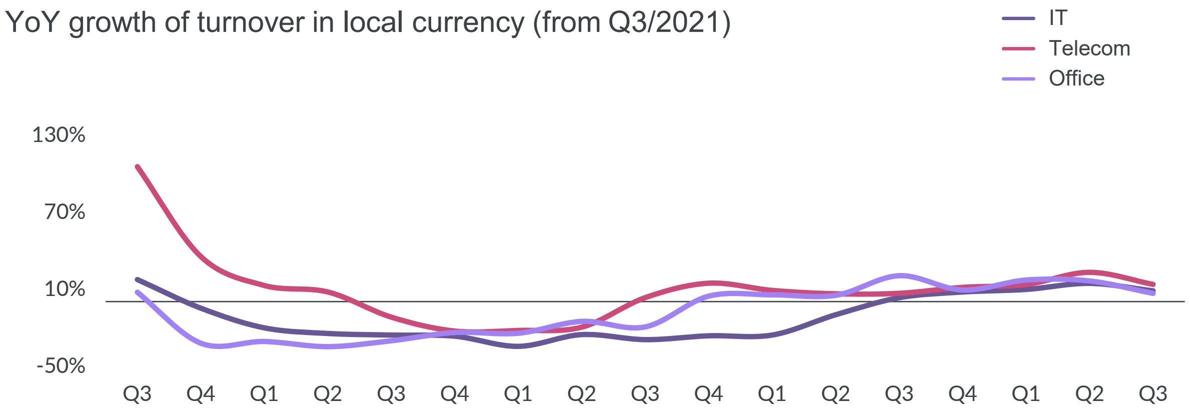
- Although all channels continued to grow, a slowdown was evident in Q3. Department stores stood out as the fastest-growing channel, posting an increase of nearly 8%.
- Additionally, for the second consecutive quarter, the online channel grew faster than traditional sales, reaching a growth rate of nearly 9% in the third quarter of 2025.

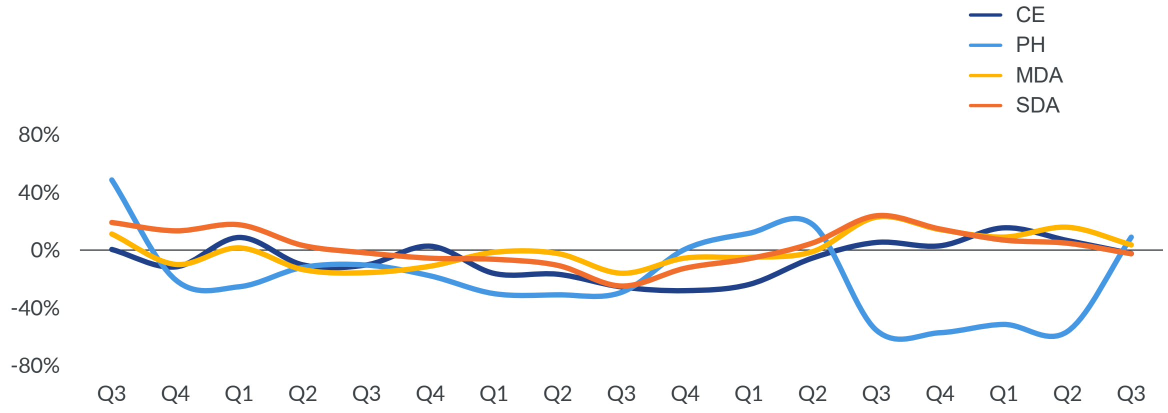
Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Helicopter View Peru

Peru
Contact person:
Adriana Tellez
(MI Lead)
Adriana.Tellez

YoY growth of turnover in local currency (from Q3/2021)





Growing & declining product segments

- The telecom sector grew at a double-digit rate, driven by entry-level phones (<S/433, +200%) and high-end models (~S/2,290, +54%). While Android remained the leading OS with a share of 74%, it has lost 6 percentage points compared to Q3 2024.
- The IT sector continued its upward trend and increased by 8% in Q3 2025. Mobile computing (+6%) was the main contributor, accounting for 4.1 percentage points of the sector's growth, driven by the strong performance of the online channel (+12%), and the non-gaming segment (+8%).In addition, media tablets (+24%) and printers (+6%) contributed, primarily supported by online sales, which surged by +27% for printers and +31% for media tablets.
- The best-performing categories in the CE sector were audio products, such as mini-Bluetooth speakers (+21%) and loudspeakers (+18%). However, despite a decline of 2.5% in Q3, PTV remained the most relevant category, accounting for more than 81% of the sector. The channel with the sharpest drop was online, at -3%.
- In MDA, growth was consistent throughout the year, including Q3, at +4%. This performance was mainly driven by washing machines, which saw double-digit growth (21%), concentrated in the 19 to 21 kg segment, representing 30% of the laundry market and growing 29% in Q3. In SDA, food preparation led at a share of 38% of total revenue.

Source: GfK Market Intelligence: Sales Tracking, Retailer Market, International Coverage (excl. NA/RU), local currency value & growth Q3/2025 vs Q3/2024, CE/PowSup/Cab, Photo, SDA/PersDiag/HCC ex AC, MDA/AC, Telecom, IT, Office

Stay tuned for the Q4 2025 edition coming in mid-February 2026

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