

Consumer Tech Industry Trends 2025

What's driving growth
in home entertainment,
smartphones,
health tech, and
workspace tech?



A Welcome from Julian Baldwin

The consumer technology industry in 2025 is characterized by cautious optimism. Consumer spending is gradually improving, but there are multiple forces shaping technology industry trends that require a nuanced understanding and approach across sectors and regions.

This report spotlights the major dynamics to watch—from consumers' financial outlook and global trade tensions to replacement cycles kicking in for key products and Artificial Intelligence (AI) innovation within products—and the impact these dynamics will have on consumer tech trends throughout the year.

It focuses specifically on the "digital" areas of home entertainment, smartphones, health tech, and workspace tech, where value growth is outperforming volume growth. Here, our industry experts share their analysis of the products that are positioned to grow this year, the forces driving that, and how and where brands can best capture those opportunities.

I am certain that you will find this report to be both insightful and of real value.



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Table of Contents

1	<i>Forces shaping global tech industry trends in 2025</i>	4
2	<i>Home Entertainment and Gaming</i>	9
3	<i>Smartphones</i>	14
4	<i>Health Tech</i>	17
5	<i>Workspace Tech</i>	19
6	<i>Key overall takeaways for 2025, including regional outlooks</i>	22
7	<i>Contacts</i>	34

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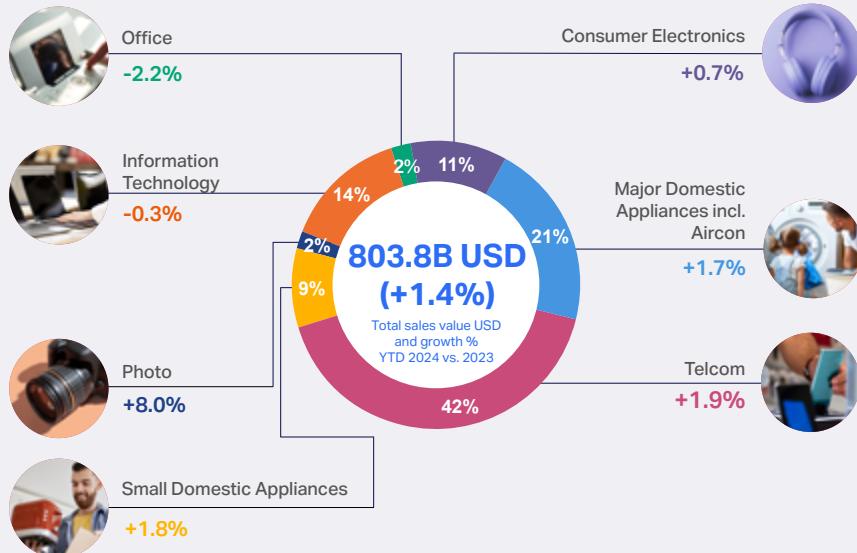
Forces shaping global tech industry trends in 2025

Year-over-year sales growth for the global consumer tech industry has lingered in negative figures ever since the pandemic lockdown-driven peak purchases of 2020 and 2021. The turning point into positive territory was forecast to occur during 2025—but it actually came in 2024, driven largely by China's consumer tech trade-in and subsidy program that started in August 2024, together with Q424 promotions and a strong US dollar (USD).

With China being the single largest market for consumer tech products worldwide, their local uplift in Q424 sales played a substantial part in boosting the global consumer tech industry from early forecasts of 0.3% value decline for full-year 2024 to an actual return of **1.4% growth**.¹

Consumer tech returns to growth in 2024, driven by price promotions and China subsidies

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



For 2025, NIQ market experts, partnering with the [Consumer Technology Association](#) to include North America data for a truly worldwide view, expect **global sales of consumer tech goods to reach 1.29 trillion USD**—the equivalent of **2% growth vs. 2024**.

That said, there are several evolving trends impacting the technology industry globally that inform these calculations, and they must be closely tracked over the coming months.

¹ Source: NIQ GfK Market Intelligence, Sales tracking, Total Consumer Tech & Durables, Global (excl. N. America), Jan.–Dec. 2024



Expanded China subsidies

The number of home appliance categories included in China's trade-in and subsidy program has increased from eight in 2024 to 12 this year, with subsidies of up to 2,000 yuan (about \$280) per item. On top of that, additional digital products are now included, with subsidies of up to 500 yuan (about \$70) per item for purchases of smartphones, tablets, and smartwatches. Xu Tianchen, senior economist at the Economist Intelligence Unit, [estimates the size of China's 2025 subsidies will double that of last year's, at around 300 billion yuan.](#)

China's trade-in subsidies for Consumer Tech expand in 2025



Source: [China Daily](#)

Key takeaway:

Subsidies are encouraging China's consumers toward a level of premiumization. A strong Q425 strategy based on innovative launches and savvy price promotions is going to be essential for the Chinese market, to ensure a strong performance in this year's traditional "golden quarter."

Overall, the Chinese subsidies are delivering premiumization, with value growth currently outpacing volume growth. For Q125, appliances, TVs, and mobile PCs in the higher price bands are expected to benefit the most from China's trade-in subsidies, where the subsidy cap per item can be maximized. For mobile phones, tablets, and smartwatches, the lower cap means the products most likely to benefit are the lower-priced items, which includes many Chinese brands. On the flip side, retailers and manufacturers in China will need focused plans for Q425, to ensure continued growth following the high benchmark set by the subsidized sales of September–December 2024.

Time for Tariffs

What they could mean for businesses *and* consumers

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Learn more about the potential implications of tariffs on global manufacturers, retailers, and consumers in NIQ's Time for Tariffs report.

US tariffs

The trade wars and political tension triggered by the [US tariffs](#) so far announced against China, Canada, and Mexico have rattled markets and raised fears of economic turbulence. The US administration has argued that tariffs will protect American industry and boost manufacturing. However, [many economists](#) say tariffs could lead to prices rising for consumers in the US and could trigger economic downturns in Canada and Mexico.

The economic evidence is that companies generally pass most—or all—of increased costs onto consumers in the form of higher prices. But [consumers entered 2025](#) in a state of inflation exhaustion. **If prices on imported goods continue to rise in the US, we ultimately expect to see US consumers purchase less overall and switch to less expensive options.**

Within the Consumer Tech industry, products like smartphones, laptops, and other electronics are heavily imported—or reliant on component parts—from China. Retailers and manufacturers across the US have been taking action to prepare themselves, from anticipatory buying and stockpiling ahead of the tariffs starting, to revising their pricing strategies, to rerouting supply chains and manufacturing operations into non-tariff countries (such as Vietnam). US imports spiked in January on the back of tariff fears, with America's trade deficit increasing 34% to more than \$130B (£100B), according to the [US Department of Commerce](#).

There are wider knock-on effects too. If sales of imported goods within the US decline due to tariffs, countries like China are likely to unload surplus stock in other markets, possibly using price promotions to gain traction. Markets including Europe, India, Japan, South Korea, and Vietnam may therefore expect to see increased competition from Chinese goods, placing pressure on pricing.

Consumer confidence and market saturation

Consumers' financial confidence is improving, but it's a case of small steps. According to [NIQ's latest global Consumer Life study](#), **46% of global consumers cite price as the most important factor in their purchasing decisions; 62% are willing to try a new brand because it offers a lower price.**

What's more, many [Consumer Tech](#) markets are now saturated, with consumers having already equipped their homes for work, schooling, and entertainment during the stay-at-home lockdowns. **For consumers to justify replacing their existing products—especially with an upgraded model—they must be convinced of the enhanced performance and experience they'll get in return for their money.**

Today's consumers continue to adopt a [purpose-driven approach to spending that prioritizes value](#)—and value is relative. For consumer tech, "value" includes factors such as durability, quality, and convenience, as well as personalization, rich features, and being affordable.

Key takeaway:

To encourage purchases, especially in higher price ranges, manufacturers and retailers must invest in compelling, consumer-centric innovation that directly targets consumers' needs across the full breadth of cost, performance, affinity with core values, and convenience.

Features consumers see as "very important" for getting value from a product: Top 3 ranking

2024	
Durability	#1
Quality	#2
Convenience	#3

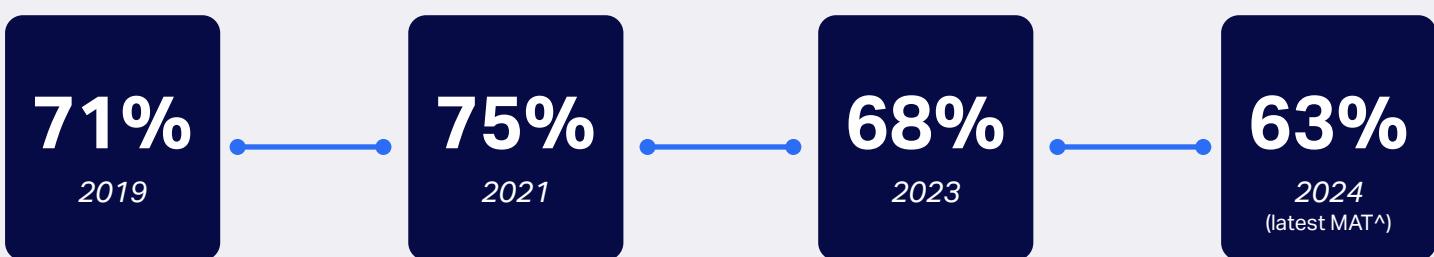
Source: GfK Consumer Life Global 2024

However, only **63% of sales revenue** across the total Consumer Tech industry last year **came from products launched less than two years ago**—a drop from 75% in 2021. That share of new products is higher in IT and Consumer Electronics, where product upgrades often occur annually, but more must be done to invest in innovation that supports premium pricing and is compelling for consumers within their current purchasing mindset.

Across total Consumer Tech sectors, newer products account for fewer total sales in recent years

% share of sales value

from products launched in the current or previous year
Total Tech & Durables



Source: NIQ GfK Market Intelligence, Sales tracking, Total consumer Tech & Durables, Global (excl. N. America and Russia), 2019–2024. MAT is "moving annual total," 12 months for the period Oct. 2023–Sep. 2024.



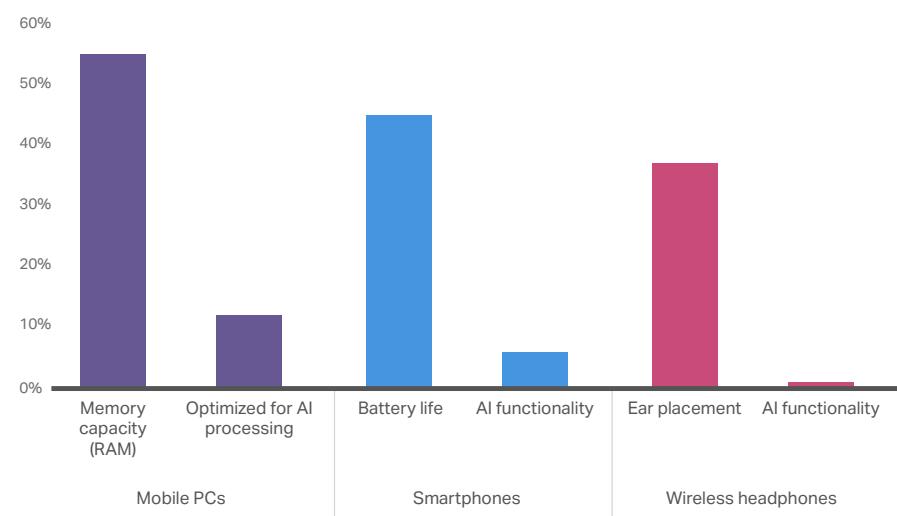
AI functionality in consumer tech

A major innovation that manufacturers and retailers are counting on to trigger consumer demand this year is AI-enabled products. At CES 2025, [AI was showcased](#) as driving hardware and software innovations across smart home, home entertainment, office tech, sustainability, health and well-being, and more. Manufacturers are particularly highlighting their efforts around privacy to reassure consumers about the security of their personal data. Currently [concerns around privacy and personal data security](#) are the number two barrier holding consumers back from buying products like smart appliances and smart security. When it comes to voice assistant speakers, that concern rises to number one.

The challenge for both retailers and manufacturers is that **"AI-enabled" isn't yet a factor in most consumers' ultimate purchase decision-making**. Features such as memory capacity in laptops, battery life in smartphones, and form function in wireless headphones vastly outweigh AI functionality, at the present time, in consumers' perception of value.

AI functionality not yet influencing most consumers' purchase decisions

Product features most important to buyer's final choice (% of buyers)



Source: NIQ gfknewron Consumer, Choice drivers per product category, Q224, 16 countries: AT, BE, BR, CL, FR, DE, GB, GR, ID, IT, JP, NL, PL, ES, CH, TR

Key takeaway:

There's a clear need for retailers, backed by manufacturers, to educate shoppers on the practical difference to their daily user experience that an AI-enabled product will deliver. There is also a need to promote products' enhanced levels of data security. Advertising and marketing must focus on use cases that mirror their core consumer segments' regular tasks and frustration points to justify the higher price tag.

2

Home Entertainment and Gaming

TV sales will continue to face lower demand, although "visible" innovations such as RGB mini-LEDs for enhanced picture quality will help to drive premiumization. Gaming PCs, accessories, and handhelds have traditionally been a growth factor across markets—and these are expected to continue their success story in 2025 as new launches and replacement cycles kick in. In Audio, headphones will continue to grow, driven by high demand for open-ear formats in China and increasing demand in the rest of the world.

With budgets easing slightly in several key regions, home entertainment shoppers may be encouraged into higher-priced purchases if presented with strong product knowledge about features that deliver higher performance, personalization, or an immersive experience.

For Home Entertainment in 2025, we expect to see a mixture of results across product categories.

TVs

The TV market remains challenging. Innovation and replacement of broken sets will be the primary drivers of sales this year, as the average replacement cycle has not yet begun and there are no major televised sporting events to trigger purchases.

The **average age at which consumers** around the world **replace their TV** is currently **six to 10 years.**² Consequently, following peak sales in 2020, mass replacements aren't expected to kick in until 2026. Brazil, India, and the UK may offer better opportunity, as they have slightly shorter average replacement cycles. That said: 2026 is a World Cup year, which means sports fans are likely to delay upgrading their TV this year so that they can buy the very latest (or best they can afford) option in the weeks leading up to this major televised summer event.

Those who do shop for TVs in 2025 will largely consist of consumers needing to replace a broken TV, rather than upgrading a working set. This is continuing last year's trend, where **45%** of TV buyers were replacing a broken set, while only **24%** were upgrading a working set. While replacement purchases still represent opportunities for upsell, manufacturers and retailers must promote benefits that offer "visible" value to consumers, such as enhanced sound and picture quality across the most popular screen sizes, to justify a higher price tag.

Consumers continue to want more immersive experiences

25% of sales revenue last year came from TVs with 70+ inch screens—up from 21% in 2023



Source: NIQ GfK Market Intelligence, Sales tracking, PTV, Global (excl. N. America), Jan.–Nov. 2024 vs. 2023



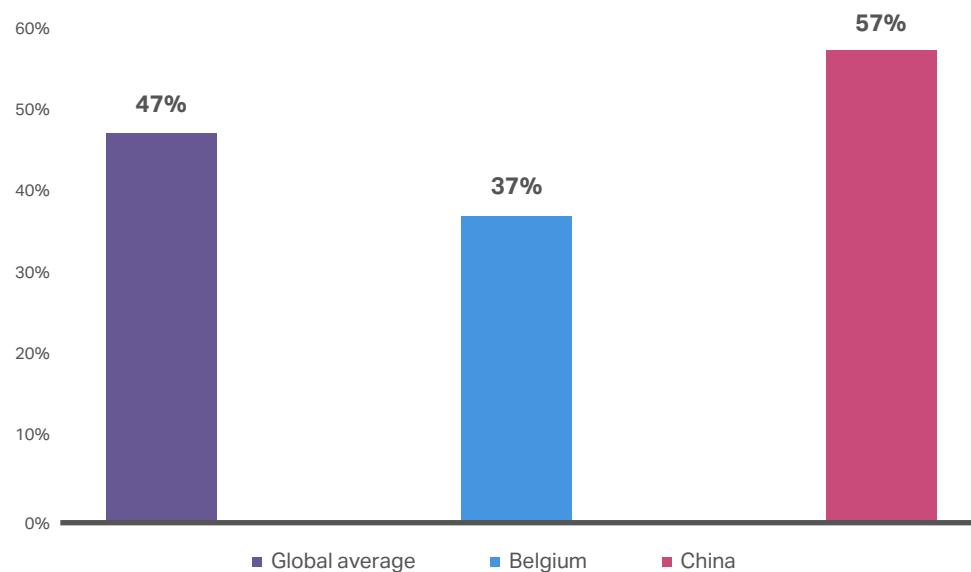
AI functionality in TVs presents an opportunity to drive premiumization this year by offering significant benefits around personalization, accessibility, and convenience. These are all [factors that continue to rank highly with consumers](#). However, as noted above, AI functionality is not yet recognized by most consumers as delivering core value. **Retailers and manufacturers must continue to invest in educating their target audiences on what AI-enabled TVs deliver, in terms of a more immersive, personalized, and convenient home experience.**

Another point to consider is that AI functionality is software-driven, so consumers don't necessarily have to buy a new TV every time they want to benefit from the latest AI-powered innovations. Brands offering regular software updates as part of an initial AI-enabled TV purchase can effectively extend the attractive lifespan of that TV. This can incentivize shoppers to buy a product in a higher price bracket, since they'll be able to keep the TV longer—which also plays to consumer desire to be [sustainable in their tech purchases](#), and to save money in the long term.

Gaming

Gamers are a uniquely dedicated audience. Just under half of consumers globally say they play either daily or weekly, with the most widely used devices being smartphones or tablets, followed by PCs, gaming consoles, and portable gaming devices.³

The percentage of the population that games daily or weekly varies widely by country



Source: NIQ Consumer Life Global 2024

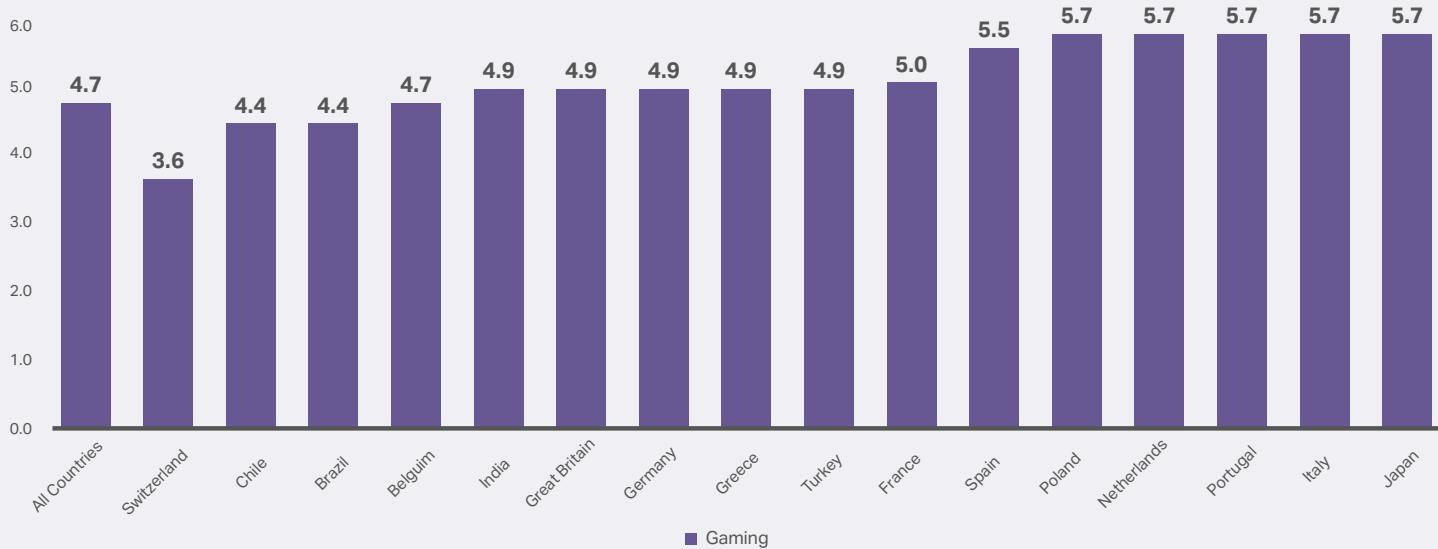
In recent years, gamers spent on upgrading their gaming accessories (mice, keyboards) rather than their core PCs or consoles as a way of improving their overall setup while staying within a tighter budget.

This year, we expect to see that change, with demand for gaming PCs and consoles driven upwards by new product launches and gradually improving consumer confidence across many countries. **Demand for gaming accessories overall is expected to continue**, but at a lower level than in previous years—particularly given this year's launches of handheld consoles, which eliminate the need for a keyboard and mouse.

This year will also benefit from the **replacement cycle for gaming PCs**—which stands at **under five years** in many countries—**kicking in**. Following peak sales in 2020 during lockdowns, replacement purchases are starting to build, with Q424 already showing signs of increasing demand.

Replacement purchases for gaming PCs bought during 2020 lockdowns have started and will increase

Average age of product: Mobile PCs/Laptops (gaming)



Source: NIQ gfknewron Consumer, Mobile PCs (gaming), Age of product being replaced, 16 countries, Q423-Q324

The “digitally receptive” demographic is the biggest consumer segment for gaming—and gaming growth is coming from online channels, rather than traditional stores, as a result. However, the size of this group differs by country. All in all, growth will continue to be led by the Middle East & Africa, China, and emerging Asia. Importantly, gamers get their product knowledge and recommendations from gaming communities and peer reviews. **Retailers must therefore focus on being exactly where gamers are, in terms of channels, to influence this important segment.**

Audio

The latest trends in the audio category for 2024 highlight a significant shift toward innovation in portable audio devices. The Audio category **grew 3% in value and volume** globally last year, led by emerging and developing markets.

Portable audio is leading this growth, driven by the increasing popularity of wireless headbands and open ear headphones. These are gaining traction due to their convenience and advanced features like enhanced audio quality, improved battery life, and advanced noise cancellation. Demand for open ear headphones is currently driven by China, but with all major Western brands launching open ear products last year, growth is expected this year across the rest of the world too.

Audio overall is benefitting from **higher levels of innovation** than other categories. In headsets, new form factors emerge every five to seven years, with innovation focused on delivering a tailored experience for specific scenarios such as commuting, exercising, and immersive listening at home.

The soundbar market stabilized in 2024, with growth largely dependent on TV sales. Dolby Atmos and rear speaker bundles remain key revenue drivers. However, the **sales ratio between soundbars and TVs is declining**, indicating a need to closely monitor consumer sentiments regarding TV sound quality.

Demand for non-smart home audio speakers is growing due to price decreases, particularly in certain markets. But the price of smart home audio speakers is hindering growth of these speakers—especially with consumer concern over privacy remaining a leading consideration. Despite this decline overall, audio brands are seeing some success in this segment as they outgrow platform brands.



Key takeaways for Home Entertainment and Gaming in 2025

For higher-end products in the Home Entertainment categories, **manufacturers and retailers must have a strong cross-channel information strategy** to influence awareness and to educate shoppers on the practical benefits of enhanced functionality. A strong social media influence, online reviews, and knowledgeable in-store sales staff are critical to maximizing upsell at the point of purchase.

After-sales support is also a critical differentiator—especially for consumers buying a premium product. For these buyers, after-sales support jumps up the list of reasons to buy from a particular manufacturer or retailer. The same is true for consumers buying AI-driven devices that they're setting up for the first time.

Most importantly, **manufacturers' and retailers' regional strategies must distinguish between advanced and emerging countries within each region**. For example, Japan, with its aging population, has a far higher percentage of people who keep their TV over 10 years before replacing it, while India and Brazil have shorter replacement cycles for TVs (potentially due to their rising middle class).⁴ Overall, though, TV demand this year will depend on price, and manufacturers and retailers must have a dedicated plan to counter competition attacks.

The same is seen in gaming PCs, where people in countries such as Italy, Japan, the Netherlands, and Portugal hold onto their devices for nearly six years. That number shrinks to just under four and a half years in Brazil and Chile, by comparison.⁵



⁴ Source: NIQ gfknewron Consumer, TV buyers, Age of previous device, Last four quarters

⁵ Source: NIQ gfknewron Consumer, Mobile PC (Gaming) buyers, Age of previous device, Last four quarters

3

Smartphones

Prolonged lifecycles are shaping the smartphone industry: **71%** of consumers now **keep their smartphone more than three years** before replacing it—up from 52% in 2020.⁶ Combine that with saturated markets where first-time buyers are scarce, and the challenge of a reduced “addressable market” is clear.

Opportunity lies in growth via premiumization. This year, consumers are increasingly rationalizing their purchases, but because they are keeping their smartphones longer, they are justifying buying higher-end models that offer enhanced durability, functionality, and performance.

Last year, demand jumped **6%** for smartphones priced over \$600 but fell **1%** for models priced below that amount.⁷ This has driven an increase in the global average selling price. **In 2024, consumers globally paid an average of \$313 for their smartphone;** in 2020, it was \$235. This puts the increase at higher than can be accounted for by just inflation.⁸ Established brands continue to dominate the market but can prepare for increased competition—especially from Chinese brands gaining traction in the sub-\$600 segment.

To drive growth in 2025, smartphone manufacturers and retailers are looking at several specific areas of innovation to drive demand and premiumization, including:

AI integration

Smartphones with AI processors are a growing segment, presenting a big opportunity for upselling. However, regional differences in adoption are significant,⁹ ranging from developed Asia (where **62%** of sales value comes from AI phones) to Latin America (where it's just **14%**). Apart from price—AI phones average around \$1,000—the **main barriers to adoption remain privacy concerns and a lack of compelling use cases that truly justify the expenditure to consumers.**

⁶Source: NIQ gfknewron Consumer, Smartphone buyers, Age of previous device, Last four quarters

⁷Source: NIQ GfK Market Intelligence, Sales tracking, Smartphones, Global (excl. N. America), Jan.–Dec. 2024

⁸Source: NIQ GfK Market Intelligence, Sales tracking, Smartphones, Global (excl. N. America), Jan.–Dec. 2020

⁹Source: NIQ GfK Market Intelligence, Sales tracking, Smartphones with AI processor, Global (excl. N. America)



Revenue share of phones equipped with an AI processor, by region

	% of total sales (by value)
Developed Asia	62%
Western Europe	53%
China	41%
Central & Eastern Europe	40%
Middle East & Africa	32%
Emerging Asia (without China)	26%
Latin America	14%

Source: NIQ GfK Market Intelligence, Sales tracking, Smartphones with AI processor, Global (excl. N. America and Russia), 2024

Despite the percentage of sales value that comes from AI-enabled smartphones, **most consumers aren't buying smartphones because of AI**—even when their new phone does have that function. In Q324, only **7.8%** of consumers globally who bought a smartphone chose it specifically because it had AI functionality—a slight increase from 6% in Q224.¹⁰ This percentage differs considerably by brand, though, demonstrating that tailored marketing can break through this barrier.

Retailers, backed by manufacturers, must invest in educating consumers on the value improvement that AI functionality will bring to the regular tasks they perform using their smartphones.

Refurbished market

Revenue from consumers buying older models of smartphones remains substantial, boosting annual sales across all brands. However, few premium brands at present exploit this trend by additionally offering refurbished secondhand devices with warranties. "Refurb" offers an opportunity for manufacturers and retailers to gain share with brand-minded but price-sensitive buyers in both developed and emerging regions—such as younger consumers who want a premium brand and the newer models, but who have limited budget.

Sales of refurbished smartphones jumped

30%

in value (Euros) in EU5 countries last year.



Source: NIQ GfK Market Intelligence, Sales tracking, Smartphones, EU5, Jan.-Dec. 2024

¹⁰Source: NIQ gfknewron Consumer, Choice drivers per product category, Q224 and Q324, 16 countries: AT, BE, BR, CL, FR, DE, GB, GR, ID, IT, JP, NL, PL, ES, CH, TR

Power packs

Power packs (aka, battery cases and power banks) continue to be in demand with consumers, growing **7%** in sales value in 2024 (mainly in Europe).¹¹ This trend will grow in 2025, driven by the increasing processing power and use of smartphones across all aspects of daily life: socializing, entertainment, shopping, research, reading news, and more. Running out of battery power is a key concern for smartphone shoppers.



45%

of smartphone buyers make their final choice based on battery life

Source: NIQ gfknewron Consumer, Choice drivers per product category, Q224, 16 countries: AT, BE, BR, CL, FR, DE, GB, GR, ID, IT, JP, NL, PL, ES, CH, TR

One potential disruption to this trend is DeepSeek, an AI chatbot app that takes far less processing power and could potentially make any phone capable of running AI software in the future. This is an important development to watch: If DeepSeek can disrupt the premiumization opportunities that current high-performance AI smartphones are promising for the industry, the impact could be substantial.

Key takeaways for Smartphones in 2025

As the year progresses, the industry anticipates a complex regional landscape, shaped by ongoing economic uncertainties and competitive pressures. **A country-by-country strategy remains essential for smartphone manufacturers and retailers alike.**

China's extension of its subsidy program to include smartphones has already driven increased demand within China in Q125. The subsidy cap of 500 yuan (about \$70) for smartphones is aimed at supporting Chinese brands, which are generally cheaper than international brands and, therefore, the subsidy covers more of the total cost for the consumer.

In addition to China, growth in 2025 will be led by India, the Middle East, and countries in Southeast Asia, where economic conditions are improving. Sales of smartphones are strongly linked to GDP growth because **everyone today needs a smartphone in daily life; therefore, as each country's economy improves, so, too, do smartphone sales.**

Japan is traditionally less price sensitive than other countries, given its culture of embracing the latest technology. This suggests AI phone adoption could be strong here, even with its aging population. In many countries, a large pool of aging consumers would dampen demand for the latest smartphone technology. But Japan is a leader in adopting technology to help improve seniors' quality of life, combat challenges such as memory loss or loneliness, or give early alerts to specific health symptoms. These are areas in which AI-enabled smartphones could play a significant role, making them a must-have rather than a nice-to-have.





Health Tech

Core wearables such as smartwatches, wrist-worn sport computers, and health and fitness trackers performed strongly in 2024, jumping **4%** in sales value vs. 2023.¹² As well as outperforming the total technical consumer goods market, it was one of the top-growing categories overall—even outpacing Telecom.

This growth is being powered by several interlocking factors:

- Enduring consumer awareness and prioritization of health and well-being
- The democratization of smartwatches, with consumers moving from analog to digital watches
- Consumers' love of the convenience and gratification they get from having instant access to their real-time health metrics

These have all paved the way for high levels of innovation and demand. **In 2019**, for example, there were **5,000 new products in the Wearables category**. **In 2024, it was 18,000**—a huge jump not seen in any other categories.¹³

The outlook for 2025 remains positive, with strong potential for ongoing organic growth. Consumers continue to place high importance on being able to track their health and wellness metrics in real time, and no region is yet saturated when it comes to wearables. In the EU5, for example, **45%** of those who bought wearables last year were first-time buyers.¹⁴ Wearables also have a price point that makes them accessible to a large proportion of consumers, including those in emerging markets.

At present, **volume growth is outstripping value growth** in all markets except APAC and the Middle East & Africa, indicating that **consumers are focusing on price**. However, the best sellers within wearables worldwide are still the established big brands. This is driven by consumer trust in known brands' quality and durability, as well as the need to match new purchases to their existing ecosystems.

Premiumization growth will be dominated by new form factors coming in (e.g., rings) and by devices offering an expanded range of compelling features, such as monitoring sleep apnea and blood oxygen levels. A core part of this will be the **integration of AI into wearables**—adding **predictive** health insights and highly personalized, real-time recommendations to their devices—**as a key differentiator**.

Premiumization in wearables is currently coming mainly from APAC and the Middle East & Africa. In addition to being less impacted by inflation, their growing middle class is enjoying increased disposable income, and several countries in this region have an "early adopter" mindset to the newest tech launches.

Looking further ahead, **manufacturers and retailers should plan to drive premiumization at the point when consumers are upgrading their current devices**. **On average, the replacement cycle is three years for wearables**.¹⁵ Opportunity lies in devices that tap into enduring consumer demand for convenience and personalization.

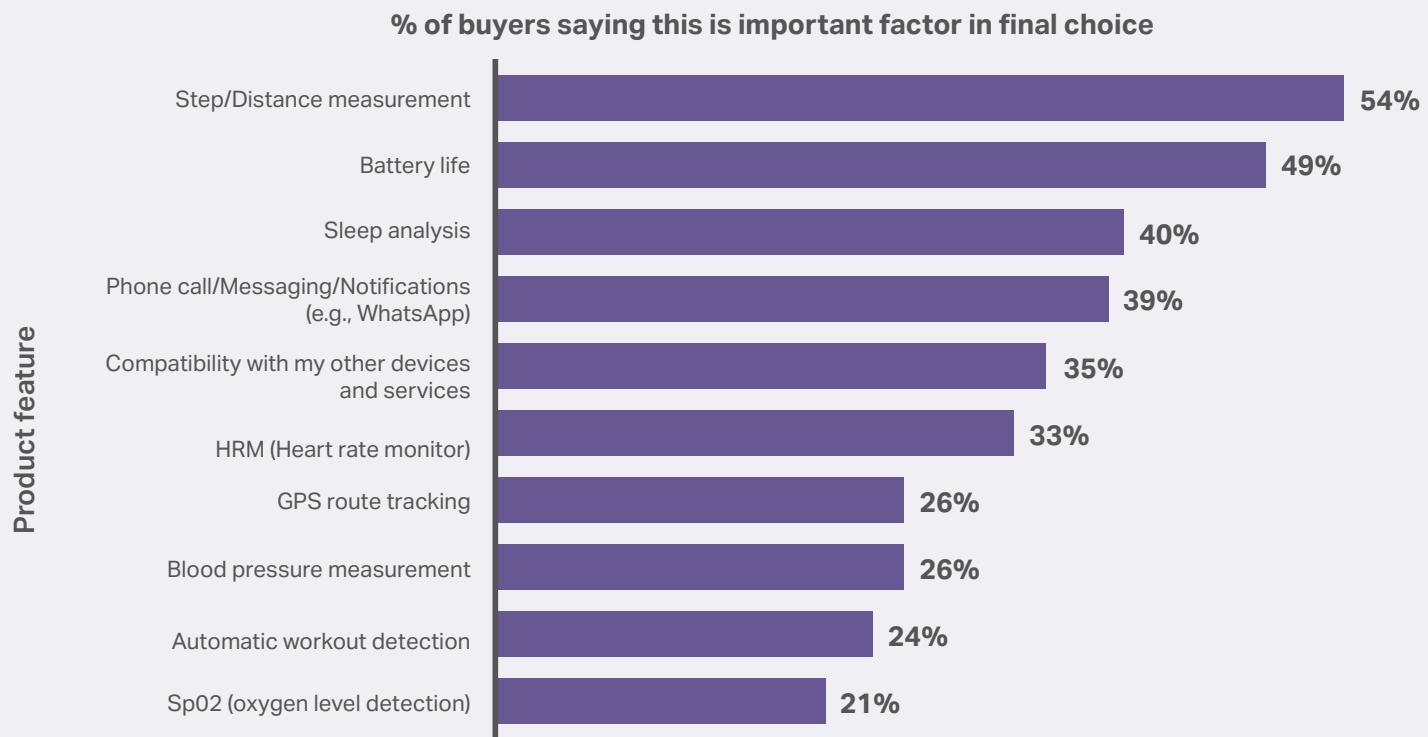
¹² Source: NIQ GfK Market Intelligence, Sales tracking, Core wearables, Global (excl. N. America), Jan.–Dec. 2024

¹³ Source: NIQ GfK Market Intelligence, Sales tracking, Core wearables, Global (excl. N. America), Jan.–Dec. 2024

¹⁴ Source: NIQ gfknewron Consumer, Core wearables, EU5

¹⁵ Source: NIQ gfknewron Consumer, Core wearables, global (excl. N. America)

Most important features for wearables buyers



Source: NIQ gfknewron Consumer, Core wearables, 14 countries (AT, BE, BR, CL, FR, DE, GB, GR, IT, JP, NL, PL, ES, CH), Oct. 2023–Sept. 2024

Key takeaways for Health Tech in 2025

As consumer demand for health tracking continues to increase, **manufacturers and retailers can maximize growth by delivering strong differentiation between models**. Price, convenience, and personalization remain key focus points for consumers. This points to innovation in both form and the range of features offered being tailored to specific use cases around fitness, well-being and fashion—and delivered across a range of price points to service all consumer segments.

A critical question for wearables manufacturers will be around the integration of personal health data into wearables to enhance personalized recommendations. Regulation and consumer attitudes around data privacy vary intensely across regions and countries, so regional and country-level strategies are crucial. Overall, **57%** of people globally claim they're willing to allow a company to access some of their personal health data—such as weight, blood pressure, heart rate, and average daily steps—to help them make healthier decisions.¹⁶ Looking regionally, though, consumers in Europe and Canada are significantly less likely to be willing to share this data, while those in Latin America and Asia Pacific countries are much more likely to do so.

5

Workspace Tech

Replacement of PCs and laptops will drive the market this year, with consumers also looking for enhanced performance and premium features that should result in an uptick in sales of higher-end devices.

Over the last couple years, money-conscious consumers have focused their IT spending on less expensive items, including tablets, keyboards, external SSD hard drives, PBX routers, and access points.

This year, **we expect to see demand for PCs and laptops also growing**, driven by improving consumer confidence and the need to replace items bought during 2020's peak demand (**the global replacement cycle for mobile PCs is typically five and a half years**¹⁷). Agile working also remains a factor: Despite a small number of high-profile companies mandating a return to full-week office working, [research by the Stanford Institute for Economic Policy Research](#) finds that US firms expect hybrid working to remain dominant over the next 12 months. What's more, the [end of Windows 10 support](#) in October 2025 will likely encourage consumers and businesses with older devices to upgrade to newer models.

Replacement expectations vary by country, however. In France, Italy, Japan, and Spain, consumers are keeping their laptops over six years, on average, before replacing them. By comparison, Chile and India have the shortest cycles, at just over four years.¹⁸

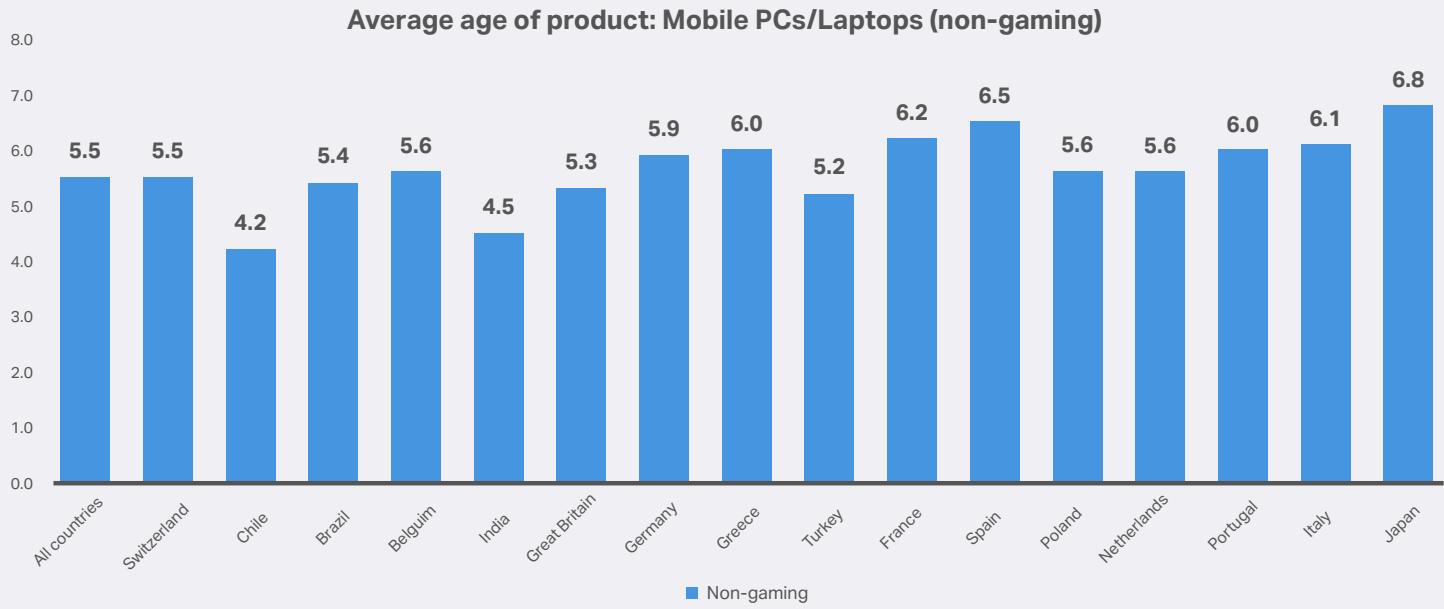
There are **also differences in the reason why consumers are buying their laptops**. In emerging markets, laptop buyers are skewed toward people getting their first product. In India, for example, **35%** of all laptop purchases are made by first-time buyers. In developed markets with greater saturation of laptop ownership, the majority of purchases are people replacing a faulty product. For example, in Germany, **56%** of laptops are bought for this reason. Poland has a notably higher percentage than other countries of people upgrading a working product (**37%**).

Whether people are making replacement or first-time purchases, they will aim to future-proof their investment, as far as their budget allows, by choosing models with durability, performance, and features that ensure they can continue to use the device for years to come. This mindset **should boost adoption of AI-enabled laptops**, as long as manufacturers and retailers are able to offer models at affordable, as well as premium, price ranges.

¹⁷ Source: NIQ gfknewron Consumer, Mobile PC (non-gaming) buyers, Age of previous device

¹⁸ Source: NIQ gfknewron Consumer, Mobile PC (non-gaming) buyers, Age of previous device

Replacement purchases for non-gaming PCs bought during 2020 lockdowns will start to have an impact from 2025 to 2026



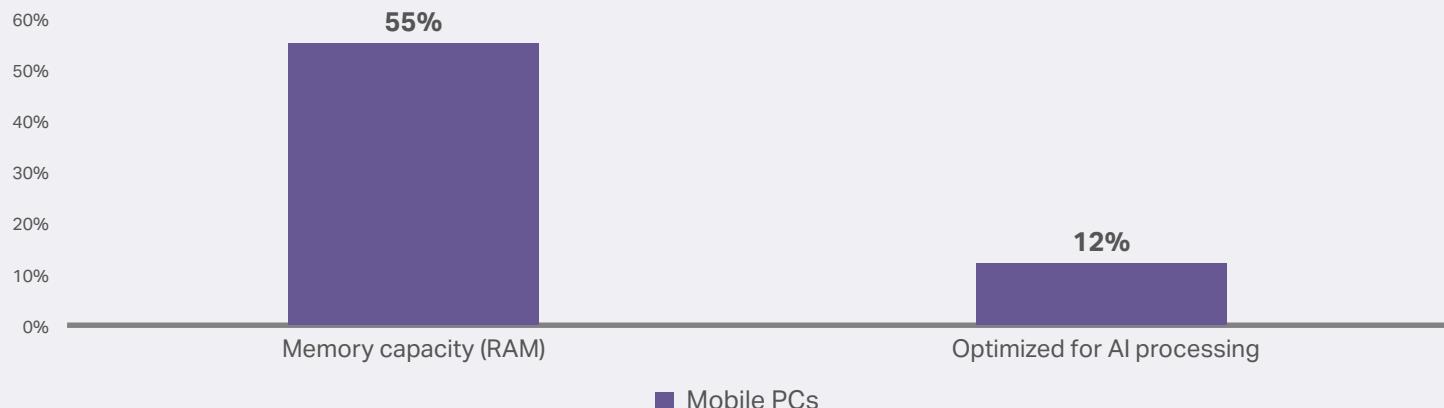
Source: NIQ gfknewron Consumer, Mobile PCs (non-gaming), Age of product being replaced, 16 countries, 2024



Consumers' replacement cycles for non-gaming PCs vary across countries, ranging from 4.2 years in Chile to 6.8 years in Japan.

AI functionality not yet influencing most consumers' mobile PC purchase decisions

Product features most important to Mobile PC buyers' final choice (% of buyers)



Source: NIQ gfknewron Consumer, Choice drivers per product category, Q224, 16 countries: AT, BE, BR, CL, FR, DE, GB, GR, ID, IT, JP, NL, PL, ES, CH, TR

Key takeaways for Workspace Tech in 2025

While 2025 presents a strong opportunity for PCs overall, industry hopes are pinned on AI functionality in PCs to boost premiumization. However, consumers are currently more influenced by features such as memory capacity (**55%** saying this was important in their final choice), the operating system (**50%**), and battery life (**49%**) than they are by AI processing (**12%**).¹⁹ **Retailers and manufacturers must educate consumers on what AI-enabled PCs can do for the average user** (not just for niche users). They must also **justify the higher price of AI vs. non-AI PCs by focusing on use cases** that directly reflect consumers' everyday tasks and pain points.

Alongside increased demand for PCs, **demand for monitors, keyboards, and mice will continue this year**. Premiumization in this area will be driven by monitors required for professional use, such as content creation, offering higher performance, refresh rates, and resolution, as well as bigger screens (for example, 24–27-inch monitors are popular for home offices).

Price and promotions will continue to be a core part of retailer strategy.

Competition is increasing from challenger brands that are offering PCs with the same range of enhanced features, but at comparatively lower prices. This is forcing the industry to focus on price—rather than innovation—as a differentiator. Additionally, many consumers continue to wait for big promotional events to make their consumer tech purchases—especially for bigger-ticket items like PCs and laptops.

[Black Friday sales](#) of laptops in Brazil, Czechia, EU5, Hungary, the Netherlands, and Turkey jumped **173%** in value in 2024 vs. 2023, and IT products overall accounted for **18%** of total Black Friday sales in these countries.²⁰ This could be especially relevant if [US tariffs](#) on China result in China pushing more of its IT products toward markets such as Australia, Europe, India, Latin America, and Southeast Asia, increasing price competition.



6

The State of Consumer Tech & Durables: Key overall takeaways for 2025

To maximize growth in 2025 and beyond, manufacturers and retailers should focus on several strategic areas, as focus for value growth shifts from traditional appliances to digital sectors. Thoughtful differentiation and targeted innovations are essential to resonate with today's intentional consumers—and those innovations must show clear use cases and tangible value as consumers seek products that enhance their experiences and justify costs. Emphasizing premium features like AI functionality can attract value-conscious consumers willing to invest in enhanced performance and convenience. Thus, educating consumers on the benefits of AI-enabled devices is critical.

Monitoring geopolitical and economic developments, such as US tariffs and China subsidies, is core to strategic planning this year, to help brands navigate potential volatility and economic uncertainties. Manufacturers and retailers must be equipped to stay abreast of fast-paced developments in a complex political landscape, understand the impacts across specific markets and audiences, and be ready to pivot to meet the emerging scenarios. Focusing on growth in nascent regions like China, Emerging Asia, and the Middle East & Africa is crucial. Tailoring strategies to these markets will sustain growth, as they are expected to drive most of the value growth in the Consumer Tech & Durables market this year.

Leveraging major promotional events to drive sales and encourage premium purchases remains crucial. These periods help move large volumes of stock and justify higher-priced items through discounts. Balancing affordability with premium features is essential: Consumers are searching for the best prices but are willing to invest in products offering enhanced durability, performance, user experience, and convenience.

The bottom line: Manufacturers and retailers must focus on targeted innovation that encourages consumer spending, closely monitor global developments, capitalize on promotional events, and target emerging markets. **Bear the following in mind:**



1 Consumer recovery will be slow and steady, but risks from geopolitical volatility and subdued economic growth remain

Resilient economic growth and easing inflation in many countries is [helping consumer confidence](#). However, the long-term economic outlook is still volatile, so consumers are planning intentional purchases by pivoting their spending within consumer technology, as well as some increase in overall budget.



2 Value growth hinges on innovative features driving premiumization

Value growth has shifted from appliances to digital sectors—especially Consumer Electronics and Telecom. Affordability remains crucial, with consumers looking for the best deal. However, they will spend on “value-rich” products offering features such as enhanced performance, a richer user experience, or greater convenience.

For PCs, TVs, and smartphones, AI functionality has the potential to drive demand for more premium models. However, consumer understanding of the value-add of AI appears low. Compelling use cases and education on [the direct benefits of AI](#) are crucial to convince consumers that the higher price of AI-enabled devices is worth the money.



3 US tariffs and China subsidies will continue to influence global dynamics for the Consumer Tech market

The interplay between [US tariffs](#) and China subsidies will create a complex and dynamic environment for the global Consumer Tech market in 2025. With the precise impacts not yet known, it's critical that manufacturers and retailers closely track developments and market reactions as they emerge and have an informed strategy for how to navigate the most likely scenarios.

The impact of China subsidies on the global Consumer Tech & Durables industry

Total T&D *sales value decline* in USD



68% of total T&D absolute **losses** originated from China vs. previous year

Total T&D *sales value growth* in USD



84% of total T&D absolute **gains** originated from China vs. previous year

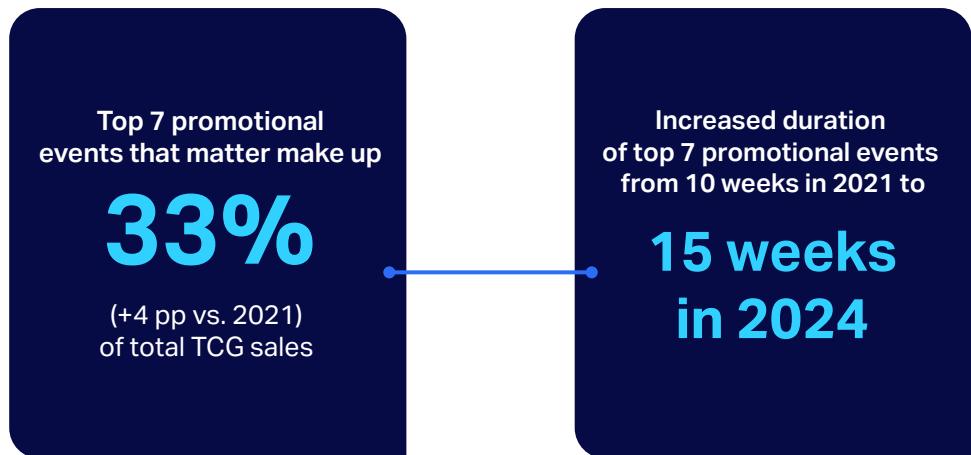
Source: NIQ GfK Market Intelligence, Sales tracking, Global (excl. N. America and Russia), 2023 and 2024 vs. previous year



4 Maximizing promotional events remains important

Many consumers are waiting for the [big promotional events of the year](#) to secure the best possible value for their purchases within Consumer Tech. In 2024, the top seven annual promotional events accounted for **33%²¹** of all consumer tech sales value that year, compared with 29% in 2021.

Increasing relevance of the top seven annual promotional events



These promotional periods are key for retailers to move large volumes of stock—particularly products such as headsets, TVs, laptops, and tablets. They also present an opportunity to encourage premium purchases, with consumers using the discount to justify buying items that would otherwise have been outside their budget.

However, **the significance of each event differs across countries in terms of the percentage of the full-year sales value it delivers**. For example, Christmas and New Year's promotions deliver **between 9% and 11%** of total annual sales in all regions, without a huge difference between them. For Black Friday and Cyber Monday, however, the difference is much greater between regions, while some previously regional events, such as 11.11, are becoming global due to the expansion of Chinese marketplaces into Europe, Latin America, and the Middle East & Africa.²²

A promotional strategy tailored to each region's own tech industry trends and consumer behaviors remains crucial for global retailers.



5 Focus on the emerging regions driving growth

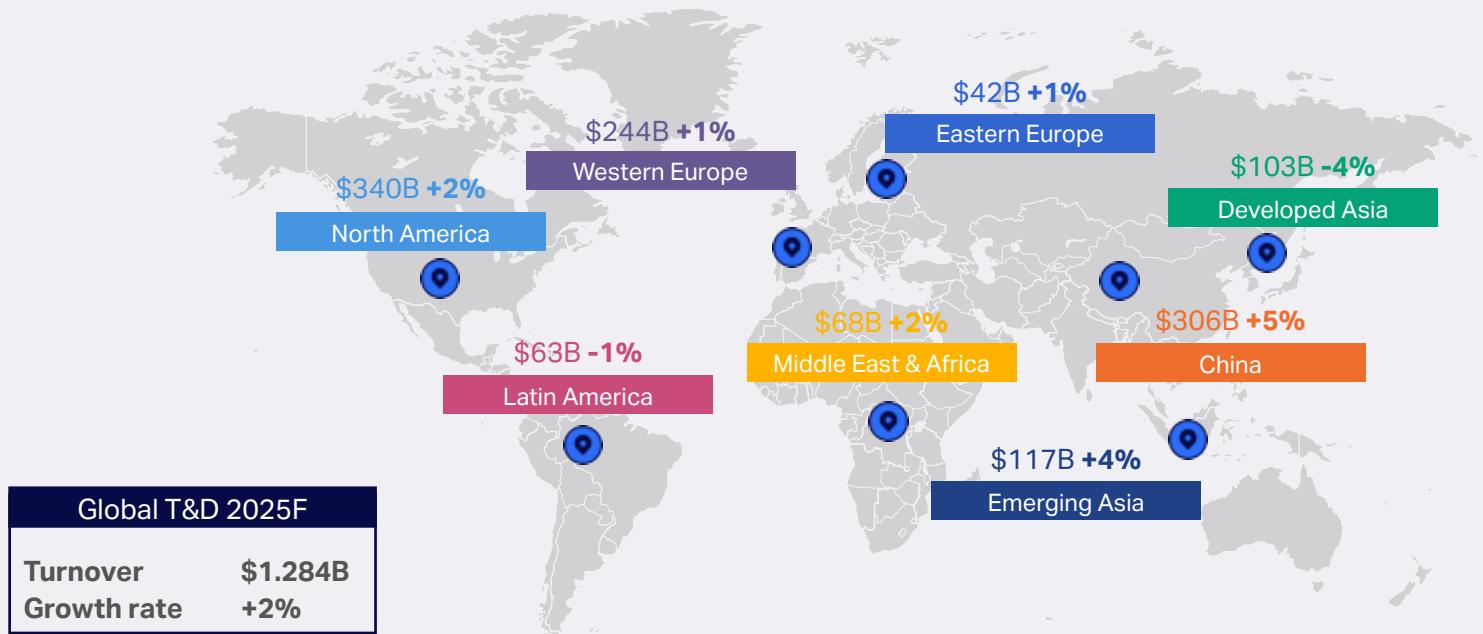
In 2024, the overall value growth in Consumer Tech & Durables sales was driven by emerging and developing economies. Combined, these economies saw their consumer tech sales grow **3%** in value year over year. Advanced economies, meanwhile, stood at **-1%**.

For full-year 2025, we expect to see this trend continuing, with **global growth of 2%** for total Consumer Tech & Durables driven by China, Emerging Asia, the Middle East & Africa, and North America.

²¹ Source: NIQ GfK Market Intelligence, Weekly sales, Global (excl. N. America), Jan.–Dec. 2024

²² Source: NIQ GfK Market Intelligence, Sales tracking, Weekly sales, Global (excl. N. America), Jan.–Dec. 2024

2025 forecast for regional sales of total Consumer Tech & Durables



Source: NIQ GfK Market Intelligence, Total market estimation incl. North America, based on USD. Forecasting date: Feb. 14, 2025, assuming stable USD exchange rate. North America estimation based on cooperation with Consumer Technology Association (CTA): <https://www.cta.tech/>

Discover how gfknewron Predict ensures your sales strategies remain fit for purpose as markets develop.

+5%

Forecasted value growth for full-year 2025, driven by trade-in program and subsidies

Specifically, NIQ's team of T&D experts anticipates the following consumer tech industry trends within each region:

Asia Pacific (APAC) region

China

The outlook for Consumer Tech sales in China has changed dramatically with the introduction of its **trade-in and subsidies program**, which is aimed at boosting consumer spending on the more energy-efficient models within the Home Appliances sector and on Consumer Electronics.

For appliances, TVs, and mobile PCs, products in the higher price bands are expected to benefit the most from the trade-in subsidies, where the subsidy cap per item can be utilized to the fullest. The increased purchase of PCs is likely to produce a knock-on effect, boosting demand for PC accessories such as keyboards and mice, although **NIQ market experts estimate an increase of 5% or less**. In addition, province-level subsidies aimed at PC monitors and printers will drive demand for these at a rate slightly higher than that expected for keyboards and mice.

+4%

Forecasted value growth for full-year 2025



Emerging Asia (excluding China)

Asia's emerging markets of India, Indonesia, Malaysia, the Philippines, Thailand, and Vietnam benefit from relative political stability, offering a **strong environment for industrial growth and foreign investment**.

This economic landscape supports stable income levels for consumers in urban areas, producing a growing middle class with increasing purchasing power. In addition, **relatively low levels of penetration of Consumer Tech products** compared with more developed markets presents significant opportunity.

The ongoing housing development in these regions is another critical factor driving growth at a faster rate than in more developed markets. As urbanization grows, there is a rising demand for new housing, which in turn fuels the need for products such as domestic appliances and TVs.

Developed Asia

-4%

Forecasted value decline for full-year 2025



Growth in developed Asia is expected to remain subdued, with economic slowdowns and debt issues constraining demand. The spotlight will be on India, with its growing middle class and expanding economy.

Economic conditions remain challenging within Asia's developed markets, with consumer confidence on the lower end and spending habits remaining more cautious.

These markets are already mature, and sales volume across most Consumer Tech categories has been declining year over year. However, a closer look at the data reveals stable growth in the premium and higher-priced segments.

This suggests that, while consumers are being more selective, they are still willing to spend when they see a compelling reason to do so. **Brands and manufacturers will need to go the extra mile to create strong narratives and stimulate demand to attract consumers.**



2%

Forecasted value growth for full-year 2025

North America region

The North American market is **a tale of two economies**. While the broad trends shaping demand for consumer technology are largely the same within the US and Canada, there's divergence in terms of consumer confidence, with the [threat of US tariffs](#) causing uncertainty—and impacting confidence and willingness to spend in Canada.

Overall, the North American Consumer Tech market is set for growth. This is being driven by stronger consumption in general, as [consumers' shift from cautious to purposeful spending](#) takes effect, together with anticipated replacement cycles for key categories of IT and smartphones this year.

There are some headwinds, however. The uncertainty around [tariffs implemented against China, Canada, and Mexico](#), and subsequent temporary exemptions, continues to rattle markets and triggered fears of economic turbulence. Products affected by tariffs are very likely to lead to increased prices for imported goods within the US, which will drive US consumers to reduce their spending again and shift to lower-priced options. To provide a buffer against this, retailers have stockpiled goods, causing [US imports to hit a record high in December 2024](#). With consumers in North America already inflation-weary, retailers will be hesitant to raise prices and are likely to push heavily on manufacturers to absorb any price increases wherever possible.

Consumer Tech products expected to perform well in North America this year include smartphones, smart kitchen appliances, and wearable tech.

Smartphones have an aging installed base in North America, presenting high potential for replacements and upgrades. Smartphones are also relatively tariff-proof within the US, due to the high percentage of consumers who pay through installment plans, which disperse the impact of price increases.

Demand for smart kitchen appliances has been growing for a while—and is expected to continue. Consumers are focused on multipurpose appliances, such as combination microwave-cooker-grill-air fryers, that take up less space in the kitchen, as well as automated devices that deliver greater convenience and time savings.

Finally, wearable tech is expected to perform highly, driven by several dynamics. Social awareness of health and well-being continues to grow, and consumers want easy and convenient ways to track key metrics without having to make special trips to medical professionals to do so. Wearables not only fulfill that need but are also accessible in terms of cost. On top of that, they offer a range of features and personalization that resonate strongly with modern consumers.

On the other hand, the traditional **PC and laptop segments** are among the categories that **will face greater challenges this year**—despite an anticipated boost in demand coming from replacement purchases expected to begin this year.

The **TV category also may struggle**, as the US market is saturated with heavy price competition: Promotional discounts are both broad and deep. With no major televised sporting events this year—and longer replacement cycles—there's little drive for consumers to spend on this category. AI functionality could offer potential here, but consumer understanding of the benefits of AI in TVs is low, and it is likely to take retailers into 2026 or beyond to change that attitude.

For 2025, maximum growth in North America lies in the affordable premium product segment, which is growing fast. High-convenience devices such as robotic vacuums and smart or automated home appliances are in demand as people continue to look for ways to relieve some of the pressures of daily life. Manufacturers that can deliver enhanced convenience, personalization, and energy savings at reasonable price bands stand to benefit the most.

Added to that, manufacturers and retailers must have a strategy for [Gen Z](#) that's tailored to their purchasing behavior. Gen Z will soon be the largest spending cohort in the US, and brands need to understand what drives their buying and how best to market to them. This will require developing strategies for social selling, 3P marketplaces, and especially personalization, which ranks highly with this segment.

The Canadian market will be a harder sell than the US, due to greater consumer uncertainty and hesitancy to spend money. Manufacturers and retailers here must convince consumers of the intrinsic value for money that products will deliver. Marketing and advertising must focus on use cases that speak directly to consumers' daily tasks and pain points, together with attributes such as durability and lower energy use that will save consumers money in the long term.



-1%

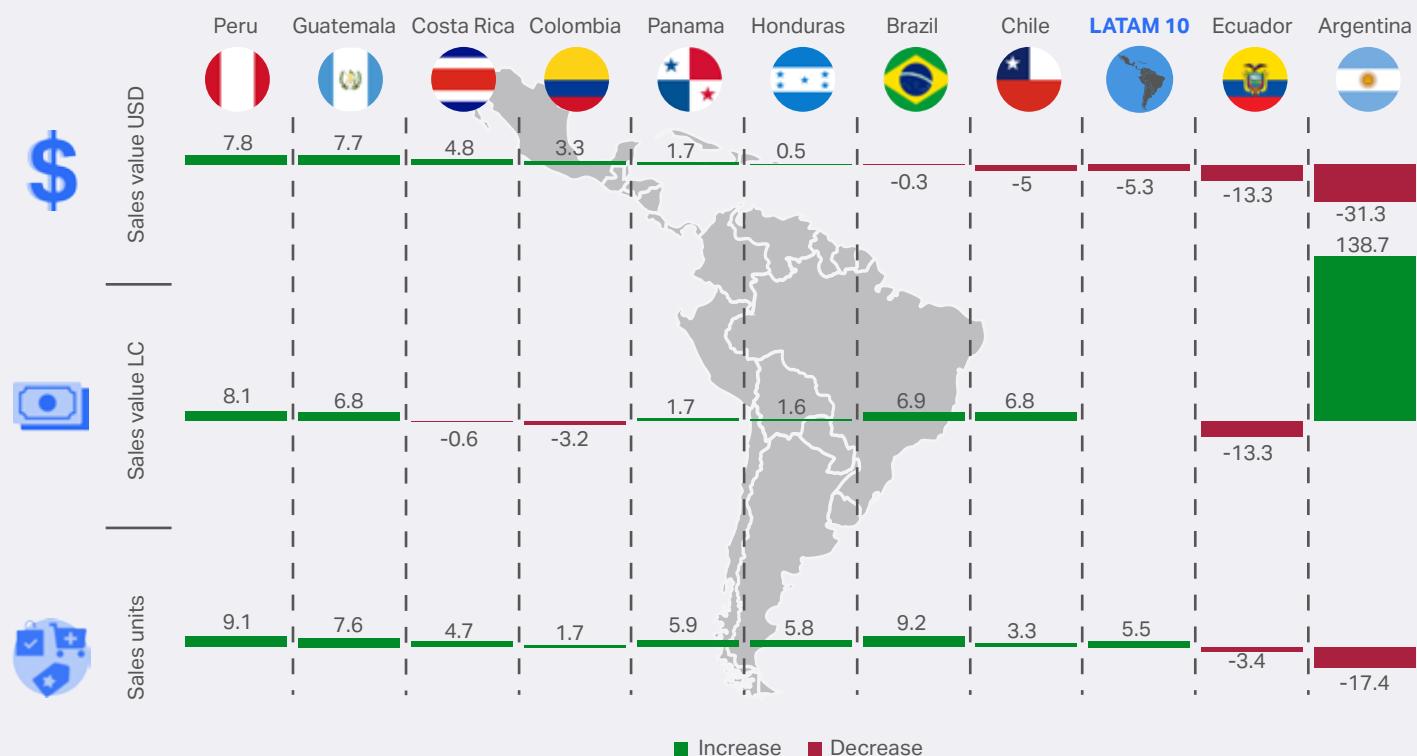
Forecasted value decline for full-year 2025

Latin America (LATAM) region

Emerging markets will lead growth in Latin America (LATAM) in 2025, driven by Brazil's strong currency and other economic stimuli. **Volume demand for consumer technology is increasing across the region**, with only Ecuador and Argentina seeing declines. However, currency devaluation is impacting value growth when reported in US dollars, leading to the -1% forecast for 2025.

Fall in sales value of Consumer Tech in LATAM strongly linked to the effect of the devaluation of local currencies

T&D | LATAM 10 | Unit growth, value growth in local currency (LC), and value growth in USD | 2024 vs. 2023



Source: NIQ GfK Market Intelligence, sales tracking, Latin America (10 countries), 2024 vs. 2023

Demand this year will be highest for Major Domestic Appliances such as washing machines, refrigerators and freezers, and air conditioning. TV sales should also start to lift in anticipation of the World Cup next year, but peak demand will be in 2026. Smartphones face a saturated market, but the established brands face less competition in this category and should benefit from consumer upgrading as they replace their current phones.

Argentina—one of the biggest markets within Latin America—continues to face headwinds, including high inflation and fiscal constraints that have impacted consumer consumption. However, GDP forecasts for Argentina have improved among analysts' projections, [ranging between 2.8% and 6%](#). These are based on anticipated improvements in household consumption and broader macroeconomic stability, particularly regarding currency and price stability. There are signs of gradual economic recovery, despite unemployment and inflation remaining high.



+1%

Forecasted value growth for full-year 2025

Mexico is combating high levels of uncertainty triggered by US tariffs of 25%, followed by various individual temporary exemptions. Fears of economic downturn and redundancies are high. At the end of last year, the [Mexican peso had depreciated by 23% against the US dollar](#) compared to 2023. While this makes Mexican goods cheaper for US buyers, which offsets a portion of the 25% tariff imposed by the US, it also makes US goods much more expensive for Mexican consumers.

Price is still a main driver of product choice across the region. In Brazil, **76%** of Consumer Tech shoppers say price is one of the top three most important factors in their purchase decisions, and in Chile, it's **69%**.²³ The result of this is that Chinese brands are gaining ground in LATAM, due to their competitive prices and an impressive range of features.

Affordable premium, rather than premium, products should therefore be the target for manufacturers and retailers looking to drive value growth in LATAM this year. Although the region still faces a lot of social inequality within countries, key audiences are showing greater overall confidence and spending capacity, and brand strategy around upgrades and premiumization features must be tailored accordingly.

Western Europe region

Despite the challenge of mature markets, **conditions are improving in Western Europe**, driven by stronger demand in Italy, Spain, and the UK. Demand within the Small Domestic Appliances category has proved resilient across the region, thanks to well-targeted and innovative products such as robot vacuum cleaners, hot air fryers, and hair stylers.

Looking ahead, replacement cycles for laptops and smartphones are expected to kick in beginning this year, and there's opportunity for premiumization from AI-enabled products. Even with low consumer awareness around the benefits of AI-enabled devices, the AI-PC market is gaining momentum in Western Europe. In July 2024 alone, **64,000** AI-PC units were sold by European distributors, with the highest demand in Germany and Switzerland. Italy and Great Britain also saw strong sales, while sales in France more than doubled between June and July 2024.²⁴

Volume demand for TVs is likely to be low, following higher sales in 2024 driven by the Euro 2024 Championship hosted in Germany and Spain's termination of its DTT standard definition channel feeds. With no major televised sporting events until 2026, which is also when replacement cycles for TVs bought during lockdowns are due to kick in, there's little to prompt consumers to spend on TVs this year.

Easing interest rates are helping to revive the construction sector, which, in turn, is supporting better performance in categories such as Major Domestic Appliances—particularly built-in appliances that command higher prices.

Looking at consumer confidence, consumers' willingness to buy is highest in Spain, with Italy and Great Britain showing steady improvement. Germany remains stable on this metric, with a relatively favorable willingness to buy compared with other countries. France also remains stable, but at a much lower level.

²³ Source: NIQ gfknewron Consumer

²⁴ Source: NIQ GfK Market Intelligence, Sales tracking, Global (excl. N. America), Jan.–Dec. 2024

Eastern Europe, Middle East & Africa (EEMEA) region

Eastern Europe

+1%

Forecasted value growth for full-year 2025

The Consumer Tech markets in Eastern Europe aren't fully saturated, but they are **experiencing slower growth**. Many categories, such as smartphones and mobile PCs, have reached a higher level of penetration, meaning that **market growth is increasingly reliant on replacement cycles and upgrades**. Added to that, brand competition in the region is intensifying, with established and emerging players vying for market share and consumer attention.

Poland and Romania will continue to lead the region's growth in spending on Tech & Durables goods. Poland is seeing positive impact from the strength of their currency against the US dollar and increasing consumer willingness to spend, while Romania shows heightened demand and stimulus to purchase. Consumer willingness to spend remains at a stable, very positive level in Hungary—and continues to improve steadily in Czechia.

Smartphones remain the most influential category in terms of total sales value for the region, and consumers here also continue to invest in TVs with larger screens and better display quality. Ongoing investment in creating and maintaining high-quality education systems is also driving demand for tablets, with the need for mobility and digital learning keeping this category strong within the region.

For manufacturers and retailers, growth opportunities exist in areas where innovation drives consumer interest, such as automated or robotic small domestic appliances, AI-integrated devices, smart home technology, and eco-friendly products.

Middle East & Africa

+2%

Forecasted value growth for full-year 2025

Strong economic sentiment in specific countries within the Middle East & Africa (MEA) in 2025 will continue to drive the region's overall demand for consumer technology. Growth will be more moderate, though, following high 2024 baselines.

Within this moderate MEA growth, some pockets and segments will drive higher growth rates through niche offerings and breakthrough innovations that resonate with specific audience segments. For example, in smartphones, "foldables" are a small segment, but volume demand is growing fast within Egypt and Saudi Arabia.

Increasing competition is a primary factor shaping the region this year due to Chinese brands expanding into MEA markets, with product offerings across the whole range of price points. This is particularly relevant today, as consumer loyalty is shifting amid increasing choices across brands, products, channels, and points of sale. Consequently, investing in a value-chain ecosystem for each of their target audiences will be key for manufacturers and retailers this year.

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strategies remain
fit for purpose as
markets develop.*

The region remains heavily fragmented, however, in both consumer profile across different countries and the competitive landscape for retailers.

- Saudi Arabia and the United Arab Emirates (UAE) are priority markets for premium smartphones, TVs, and laptops. However, demand for lower-priced devices is also increasing, with lower-income consumers buying Chinese brands that offer strong features and functionality at lower price points.
- Saudi Arabia's growth in gaming PCs and accessories will continue, driven by the social adoption of e-sports in the country.
- In the UAE, premium purchases overall are being boosted by higher-income expatriates returning from Russia, together with foreign tourists to UAE buying portable tech to take home with them.
- For Israel, stabilization of supply chains in the aftereffects of the war will be a key factor for 2025.
- South Africa's market will continue to be shaped by Chinese products that offer higher configuration at lower price points. This dynamic is expected to increase in South Africa, with the success of Chinese brand TVs in the country creating a brand halo effect that will spread to other categories, such as Home Appliances and Smartphones.
- Egypt remains a unique challenge in 2025, with high inflation and currency devaluation impacting growth, together with the government ban on importation of key Consumer Tech goods.

For 2025, brands selling into the Middle East & Africa must answer the dual challenge of a fragmented consumer profile within countries and a congested retailer landscape. **Creating true brand differentiation—together with a tailored product range that meets the varying sweet spots within each country for both pricing and functionality—will be core to growth.** In addition, **manufacturers and retailers must stay fully informed on consumer trends developing across other markets**, since consumers in the Middle East & Africa are closing the gap in terms of adoption of global trends.



Your next steps

The global Consumer Tech & Durables sector is entering a pivotal year, signaling a turning point after several challenging years. **Global sales are forecast to reach nearly \$1.29 trillion in 2025**—that's **2% growth** year over year.

Demand is being driven by stabilizing consumer behavior as inflation eases, enabling a [shift from cautious saving to more intentional spending](#). However, consumer confidence remains fragile, and **businesses must adapt to a landscape shaped by localized demand, value-driven purchasing, and focused consumer priorities**.

To navigate this year's unique dynamics and capitalize on the opportunities, **manufacturers and retailers must produce tailored strategies that meet the highly focused and evolving demands of consumers, country by country**.

NIQ's teams of consumer technology experts are at hand to support you in these efforts. For more information on our detailed tracking and understanding of the industry and consumer dynamics shaping your markets, or to contact our team of experts, visit us at <https://nielseniq.com/global/en/industries/tech-and-durables/> or find our contact information on the next page.





7

Contact our experts to discuss how to maximize your opportunities in 2025



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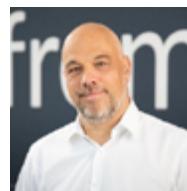


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NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together two industry leaders with unparalleled global reach. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than \$7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

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