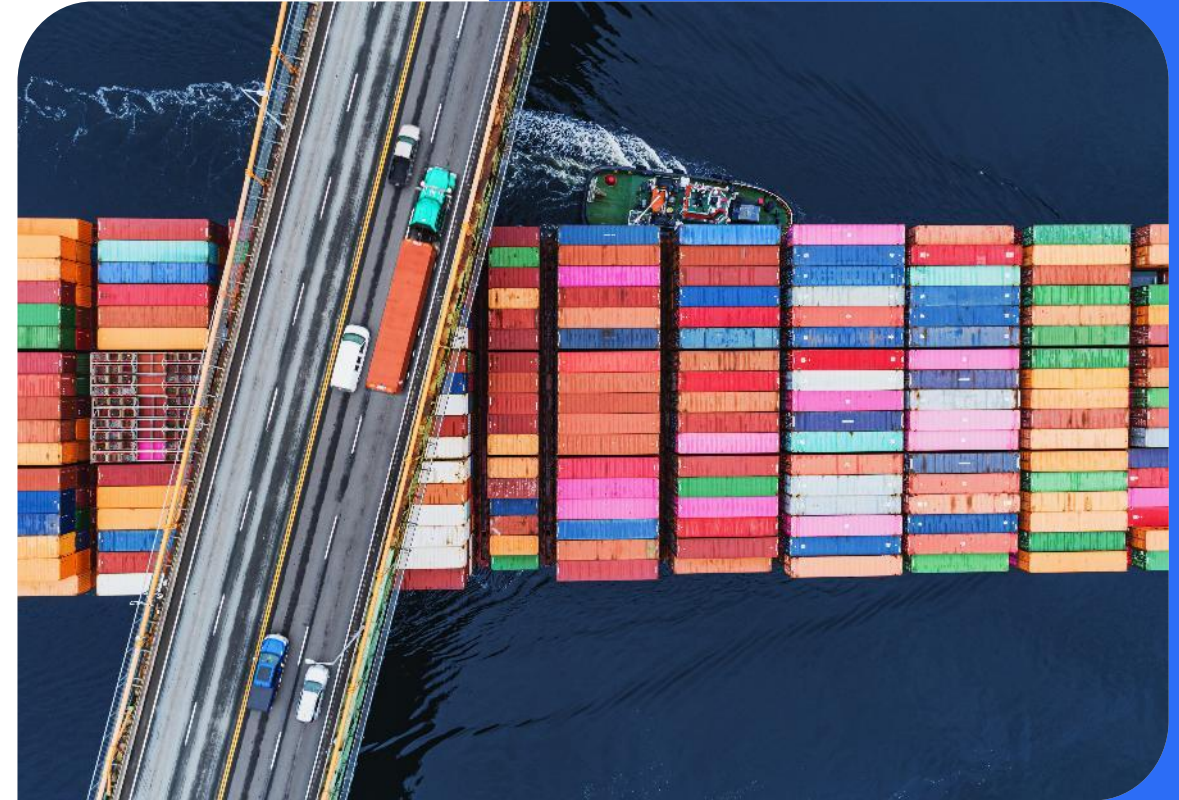


# Global Tech & Durables Market Estimation

Q4 2025 update

**Global Strategic Insights Team**

Status Feb 12th, 2026  
(based on Q4 2025 data)



# Methodological approach global T&D market estimation

How does Global Strategic Insights Team create the global TCG market estimation?

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What data is the global estimation mainly based on? 

**Market Intelligence sales tracking data** – coming from all tracked countries worldwide (excluding North America and Russia).

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Is it a data science approach or a market expert estimation? 

It is a **market expert estimation**, framed by the expertise of local/regional/global experts. In addition, historical trend data of previous year and current sales coming from GfK MI data are considered as input for the estimation.

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Can this estimation be broken down by category/country? 

No, it is a **top-down expert estimation** approach, revealing the global T&D picture by region or by sector. Further splits are not feasible due to the expert estimation approach applied. For major categories with SIMA/gfknewron forecasting, you may redirect your clients to the appropriate contacts.

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The forecast reflect current expectations and projections based on available data, historical patterns, and various assumptions. These are not guarantees of future outcomes and are subject to inherent uncertainties, including changes in consumer preferences, economic conditions, technological advancements, and competitive dynamics. Actual results may differ based on changing conditions.

In case you need more information, please contact [strategicinsights.nielseniq@smb.nielseniq.com](mailto:strategicinsights.nielseniq@smb.nielseniq.com)

# What changed compared to past year's forecast?

Methodology and Data Source adaptations

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How do you estimate North America and missing coverage



North America's market estimates have traditionally relied on third-party sources, such as association data and global forecasting insights. This quarter, we launched a **new partnership with the Consumer Technology Association (CTA), the organization behind CES**. CTA will now provide us with market figures and forecasts **specifically for North America, covering Consumer Electronics, IT and Office, Telecom, and Photo sectors**.

We have **retroactively integrated these figures back to 2021**. Our previous assumptions underestimated North America's market size. With the inclusion of CTA data, **North America's market weight/size has increased. However, the year-over-year development has only changed slightly** due to the backdated integration

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Coverage adjustments

We always **use the 2024 coverage DB data**. We have applied this new data to Retailer market for IT + Office and our Panel market numbers for other sectors, retroactively adjusting figures back to the start of 2024 to calculate the Total Market. This adjustment has **resulted in slight changes to the 2024 total market figures**.

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Country scope changes

According to GfK policies Russia has been removed from the forecast. As a result, **Ukraine and Kazakhstan are now reported under CEE**

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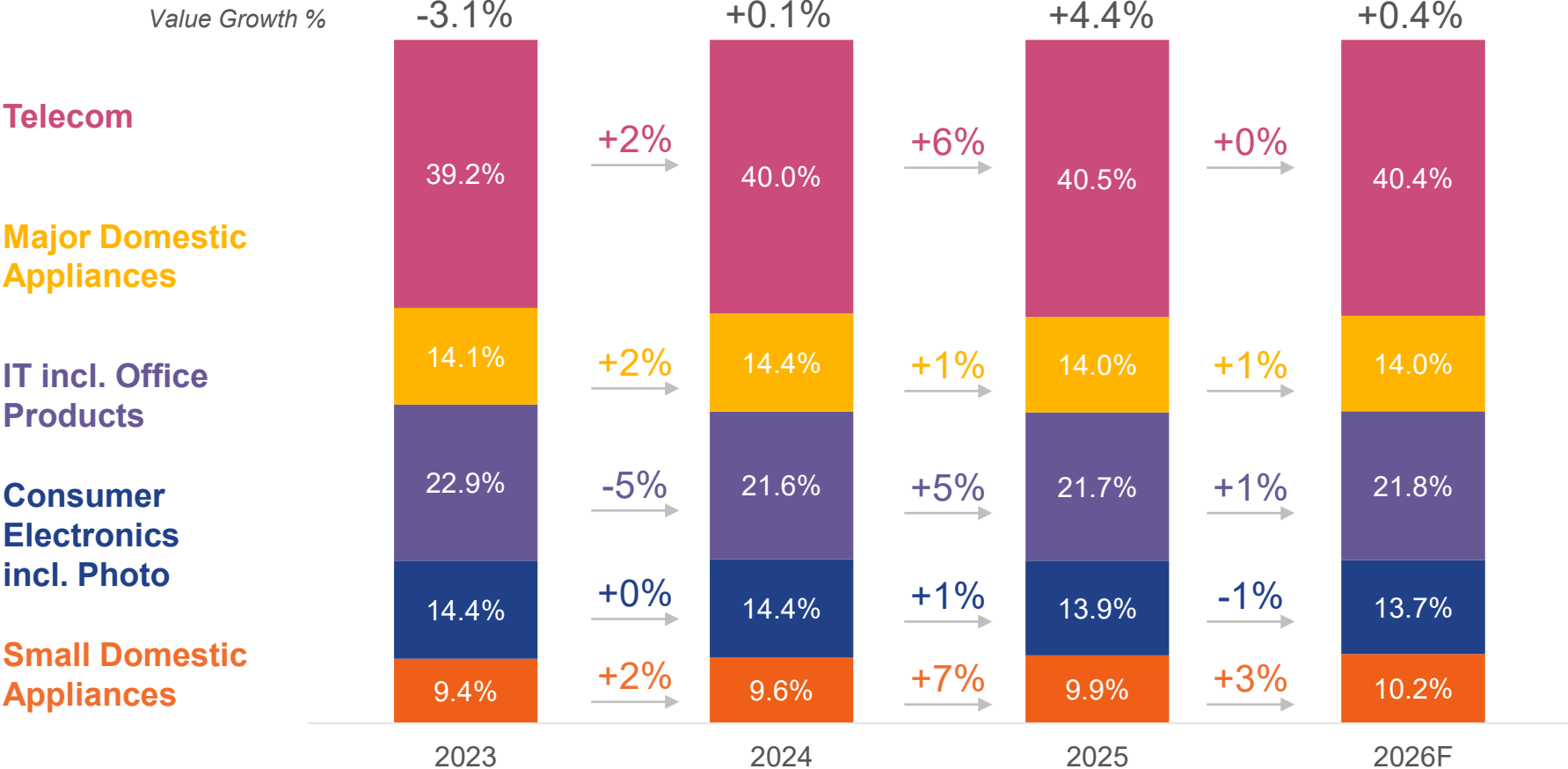
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# 2026 Full Year

T&D market forecast

# Global market for tech and durables: consumer share of wallet

Slight growth expected for [2026](#)



**\$1,337bn**  
**+0.4%**  
 2026 (forecast)  
 Sales Value USD

Source: GfK Market Intelligence and total market estimation incl. North America, based on USD Forecasting date: Feb 12, 2026, assuming stable USD exchange rate |  
 North America estimation based on co-operation with Consumer Trade Association (CTA)  
 Global T&D market estimation 2025-Q4 update

# Sector specific rationale for 2026 estimation

## Telecom

- *Apple's significant positive launch effects* have *boosted expectations* also for the Samsung launch in Feb/Mar.
- *Europe may run into next churn cycle*, after two weaker years. We already see it with Apple launch.
- *China's 2026 outlook is negative* due to *fading subsidies* and high *2025 baseline effects*, which will dampen domestic growth and weigh on global growth expectations.
- Developed Asia is *influenced by India performance*, where premiumization leads to strong revenue increases.

## Consumer Electronics & Photo

- *Consumer electronics market is saturated*. However promotional sales ahead of WorldCup 2026 in Canada, Mexico and USA are expected to increase demand.
- *RGB MiniLED* enhancing displays further and there is a *chance of premiumization of the MiniLED segment* and value increases.
- Further growth via penetration in headphones remain via innovative technologies such as *Open-Ear segment*.

## Information Technology & Office

- *PC market growth will decelerate but remain slightly positive into 2026*, supported by residual late-cycle replacements and the tail end of the Windows 10 refresh.
- *Elevated device prices driven by the ongoing global memory shortage* are expected to sustain overall value growth even as volumes soften.
- *China's 2026 outlook is negative due to high 2025 baseline effects*, which will dampen domestic growth and weigh on global growth expectations.

**General assumption China trade-in policy support 2026:** This baseline scenario assumes some kind of continuation of financial support for the market, but not to the extent as in 2025. As policies are in place for more than a year now and baselines kick in, China growth will be impacted significantly in Q4 2025 and full year 2026.

# Sector specific rationale for 2026 estimation

## Major Domestic Appliances

- Relatively *cautious purchase behavior is expected to persist*, limiting upgrades, especially if tariffs fuel inflation.
- High Q1-3 25 baselines due to Chinese *subsidies are expected to impact growth negatively*. Consequently, China appetite for more premium and growth of offline sales is likely to reduce and normalize
- *Volume growth will be slightly growing* due replacement demand. Premium sales pick up outside of China, e.g. in Built-In markets.

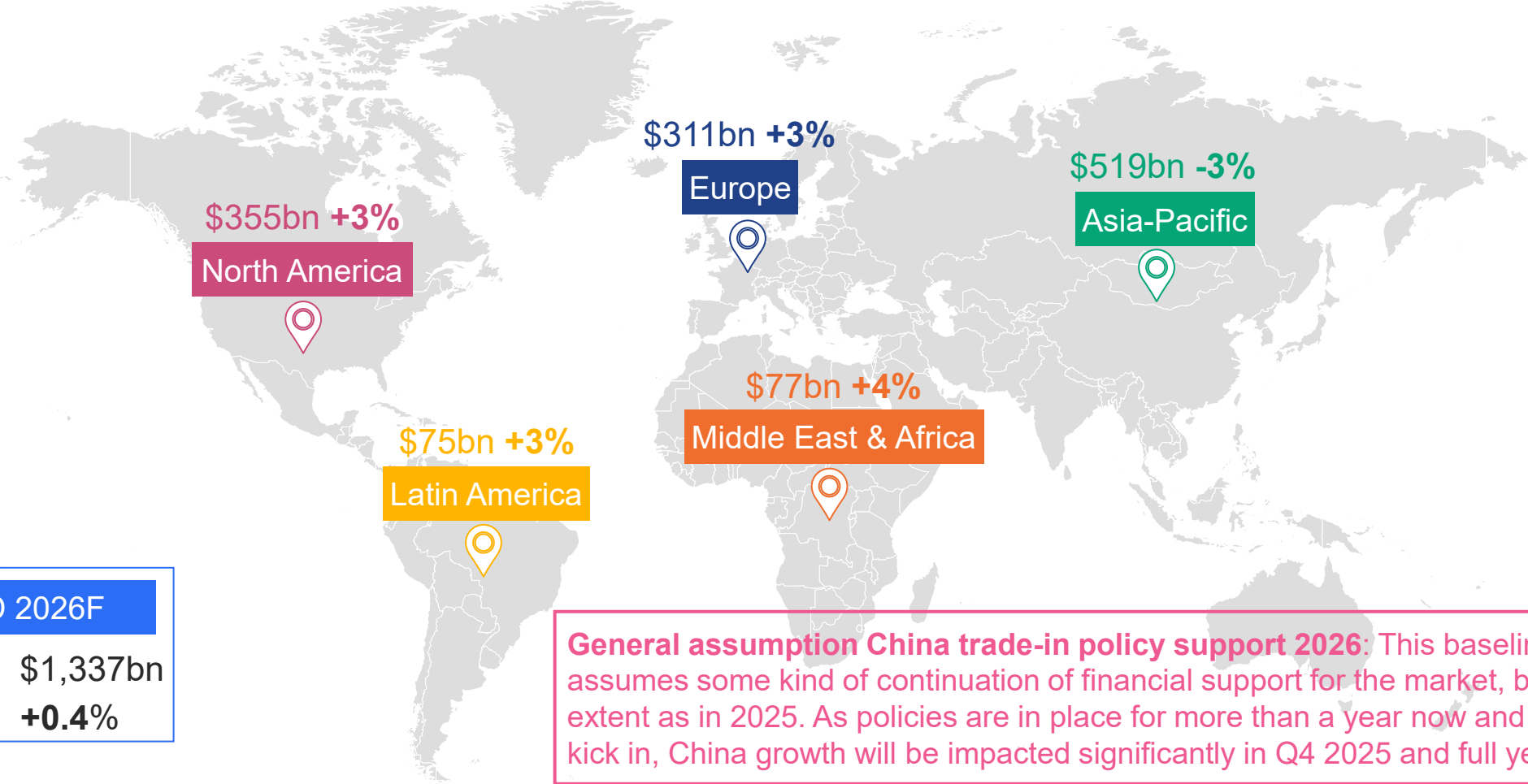
## Small Domestic Appliances

- Consumers will *cautiously spend a premium on innovative, multi functional products* that offer greater convenience.
- Prices may increase in 1HY 2026 if *geopolitical volatility persists* and may continue to rise due to innovation and new multifunctional/ smart SKUs at premium price points.
- Chinese subsidies have boosted sales in 2025 but it will have negative impact on 1HY26 due to *high baselines and front loading of demand in 2025*.

**General assumption China trade-in policy support 2026:** This baseline scenario assumes some kind of continuation of financial support for the market, but not to the extent as in 2025. As policies are in place for more than a year now and baselines kick in, China growth will be impacted significantly in Q4 2025 and full year 2026.

# Global market for tech and durables: regional split 2026 (forecast)

2026 Full-Year forecast: 100% coverage, including North America



**Global T&D 2026F**

**Turnover** \$1,337bn

**Growth Rate** +0.4%

**General assumption China trade-in policy support 2026:** This baseline scenario assumes some kind of continuation of financial support for the market, but not to the extent as in 2025. As policies are in place for more than a year now and baselines kick in, China growth will be impacted significantly in Q4 2025 and full year 2026.

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 North America estimation based on co-operation with Consumer Trade Association (CTA)  
 Global T&D market estimation 2025-Q4 update

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**New format but still easy**

*Won't take you more than 2 minutes!*

**NIQ** Thought Leadership: T&D Global Trends FY2025 Multi Client (Global)

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Based on your recent experience relating to T&D Global Trends FY2025, how likely are you to recommend NielsenIQ Thought Leadership to a colleague? \*

0 = Not likely at all 10 = Extremely likely

0 1 2 3 4 5 6 7 8 9 10

How satisfied are you with the **actionability** of the insights and recommendations?

0 = Not satisfied at all 10 = Extremely satisfied

0 1 2 3 4 5 6 7 8 9 10

How satisfied are you with NielsenIQ's **knowledge of your industry and business** based on the content shared?

0 = Not satisfied at all 10 = Extremely satisfied

0 1 2 3 4 5 6 7 8 9 10



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**P.S.** How the score is calculated:

0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	Neutral	Satisfied



**Easy tip:**

**If you like it, give us a 9 or 10!**

**Only the first question is mandatory!**

# Thank you

Global Strategic Insights Team

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Please contact in case of any queries.

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