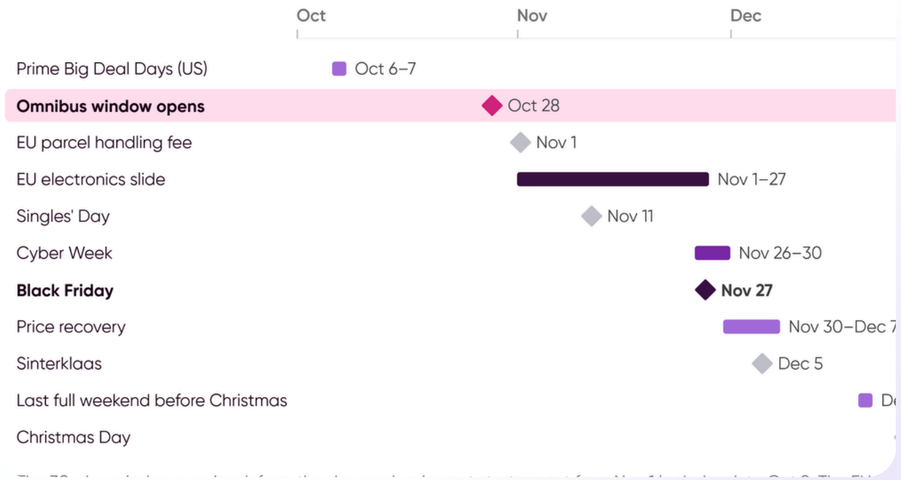
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Holiday Calendar, Oct 2026 to Jan 2027

Electronics discounts start early, so reference windows





Holiday Pricing Report 2026: Consumer Electronics

Pricing data, trends and forecasts for Europe and the US

✦ KEY FINDINGS

Devices cost more this year

AI data centres are buying up memory chips, so Gartner expects PCs up 17% and smartphones up 13% versus 2025.

Electronics is what people wait for

A TV or laptop is a big, planned purchase: 14% of Dutch consumers wait until late November to buy one.

Electronics discounts start earliest

In Omnia's DE/NL data, prices started sliding in early November 2025, weeks before Black Friday.

Cheap doesn't mean discounted

Brands put something from every category on offer, so discounts spread across every price range.

US discounts hold steady

Adobe expects online electronics discounts to peak at 30% off list again, best on Cyber Monday.

Germany is the weak spot

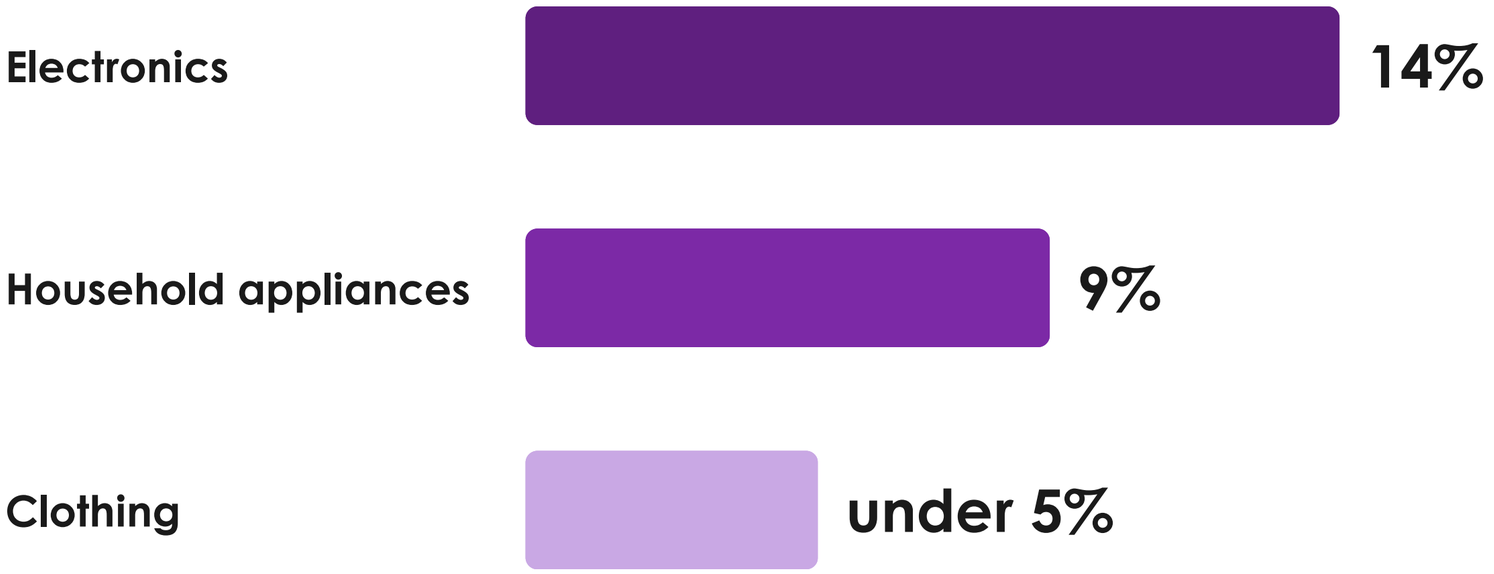
Ceconomy grew thanks to markets like Spain and Italy, while the rest of DACH held back.

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Europe Up Close: Netherlands

Dutch shoppers wait for electronics deals

Share of Dutch consumers who wait until late November to buy, by category



Younger shoppers wait the most.

40%

of 18 to 34-year-olds hold off until late November

37.8m

iDEAL payments in the run-up week, about six times the 6.25m on Black Friday 2025

bol.com

was the only one to match Amazon's Prime Day cuts. MediaMarkt and Coolblue sat it out

Sources: Overstappen.nl survey; iDEAL; Omnia Prime Day 2026 analysis

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EUROPE UP CLOSE

Costs are rising, shoppers are holding back

NETHERLANDS

€3

EU customs duty per item on online orders under €150 from outside the EU since July, plus a €2 handling fee from Nov 1.

GERMANY

+9.2%

consumer prices for IT equipment in September, nearly three times overall inflation of 3.3% (Destatis).

GERMANY

+2.0%

holiday sales growth forecast by Bain, the weakest of the markets it covers.

GERMANY

29%

of shoppers plan to start on a generative AI platform, against 68% on Amazon (Bain).

UNITED KINGDOM

+1.7%

non-food shop prices in October, more than double September's 0.8% (BRC).

NETHERLANDS · ACM

18 of 24

large webshops made misleading discount claims, mostly around the 'from' price.

Europe Up Close: Electronics Retailers

Growth comes from the south

Ceconomy · MediaMarkt

+3.4%

sales growth to €7.6bn, October to December 2025

30%+

online share of sales, a first outside lockdowns

Coolblue

+4.2%

revenue growth to about €2.56bn in 2025

−11.6%

EBITDA in the same year: sales grew, profit didn't

Currys

+6%

UK and Ireland like-for-like sales over the summer

Stocked

up early on memory-heavy devices to cover supply until at least September

Sources: Ceconomy Q1 2025/26; ANP; Currys trading update; Reuters

The Memory Squeeze

AI data centres are making devices pricier



+17%

PC prices versus 2025, as memory costs more than double (Gartner)

+13%

smartphone prices versus 2025 (Gartner)

16% → 23%

memory's share of what it costs to build a PC, 2025 to 2026

+12.2%

US price index for computers and audio-video gear in a year

Budget devices have the least margin to absorb this, so expect fewer, shallower cuts on entry-level laptops and phones.

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The US and the Brands

US holiday spend is still forecast to grow

INDICATOR	2026 FORECAST	SOURCE
Online holiday sales, Nov 1 to Dec 31	**$275.1bn, +6.7%**	Adobe
Online electronics sales, Nov 1 to Dec 31	**$63.3bn, +5.9%**	Adobe
Peak online electronics discount	**30% off list, best on Cyber Monday**	Adobe
Peak TV and computer discounts	**TVs 23% (best on Black Friday), computers 23% (best on Cyber Monday)**	Adobe
Retail sales, Black Friday to Cyber Monday	**Over $85bn, +8.75%**	Bain
Retail sales ex autos and gas, Nov 1 to Dec 24	**+5.5%; online +11%, stores +3.6%**	Mastercard
Electronics spending, 2026 so far	**+10.7% year on year**	Mastercard
Average gift spend	**$708, down 2%**	PwC

Pink rows: electronics-specific forecasts. Part of the growth is just higher prices: Mastercard puts 2.8 points of its 5.5% at inflation.

EU/UK vs US

Same hunt for value, different peak days

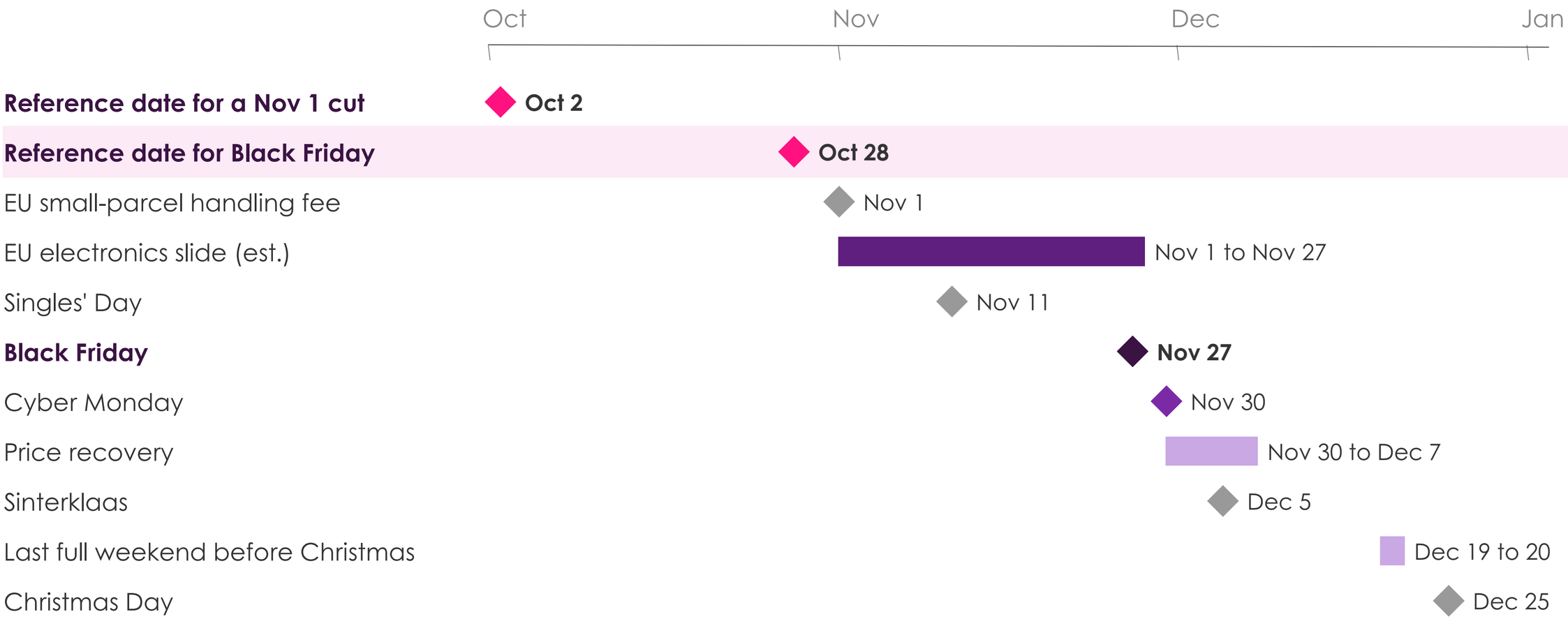
	Netherlands	Germany	UK	US
Electronics signal	14% wait until late November for a TV, laptop or phone	Ceconomy saw consumer restraint in the rest of DACH	Electronics growth of about 1 to 5%, driven by units (Bain)	Online electronics $63.3bn, +5.9% (Adobe)
Peak moment, 2025 (all categories)	Run-up week: 37.8m iDEAL payments vs 6.25m on the day	Black Friday: 48% planned to shop it	Black Friday: +62% transactions vs the daily average	Cyber Monday: $14.25bn online
2026 holiday outlook	No 2026 forecast published yet	+2.0% (Bain)	+3.5%, mostly inflation (Bain)	+5.5% retail ex autos and gas; online +6.7%
Discount rules	**EU 30-day lowest price, enforced by the ACM**	**EU 30-day lowest price**	Outside the EU rule	Not covered

Only the EU ties every discount to a 30-day price history. One global promo calendar risks over-discounting in Germany or under-competing in the US.

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Holiday Calendar, Oct 2026 to Jan 2027

Reference windows open in early October



The 30-day window runs back from the day each price cut starts: a cut from Nov 1 looks back to Oct 2. The EU slide span is an estimate based on last year's data.

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OMNIA DATA · BLACK FRIDAY 2025

What Omnia tracked around Black Friday 2025

6 weeks

of daily pricing data around Black Friday

~60k products

tracked daily

3 categories

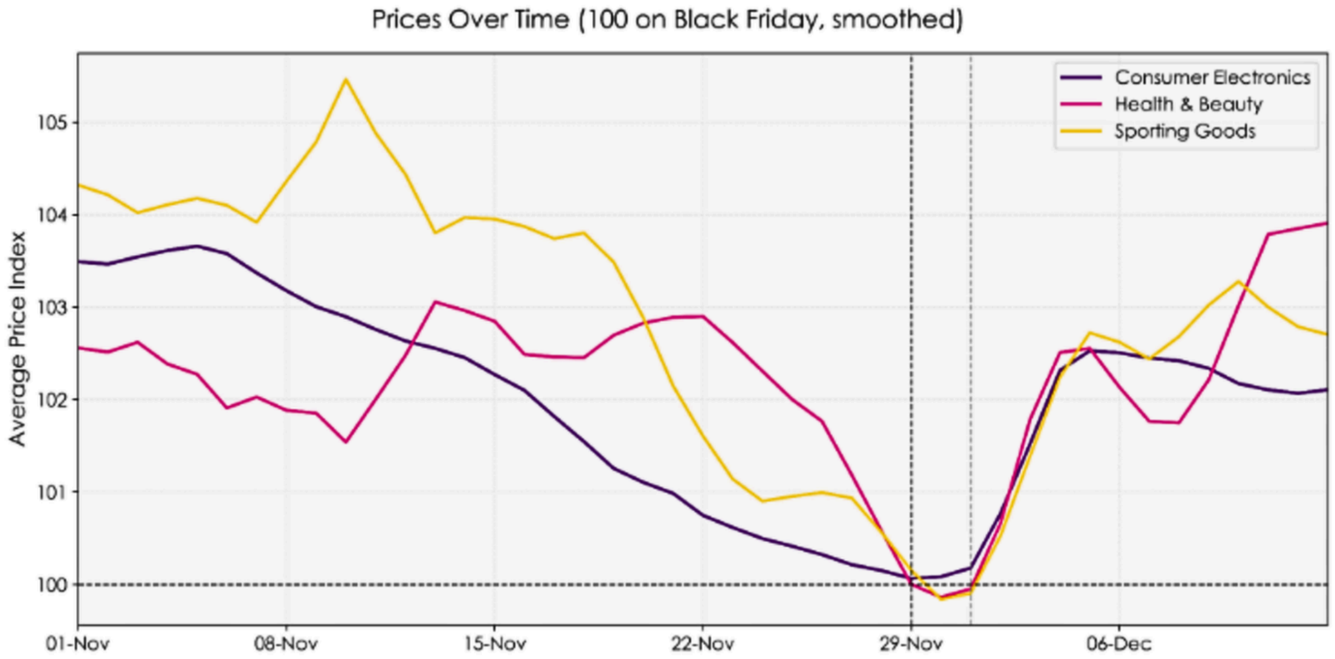
Consumer Electronics, Sporting Goods, Health & Beauty

DE + NL

German and Dutch markets

Black Friday Insights

Electronics took the slow road



Average price index, 100 on Black Friday 2025, smoothed. Germany and the Netherlands.

Consumer Electronics

Earliest and most gradual decline, from the start of the window.

Sporting Goods

Prices climb first, peak about a month out, then drop sharply.

Health & Beauty

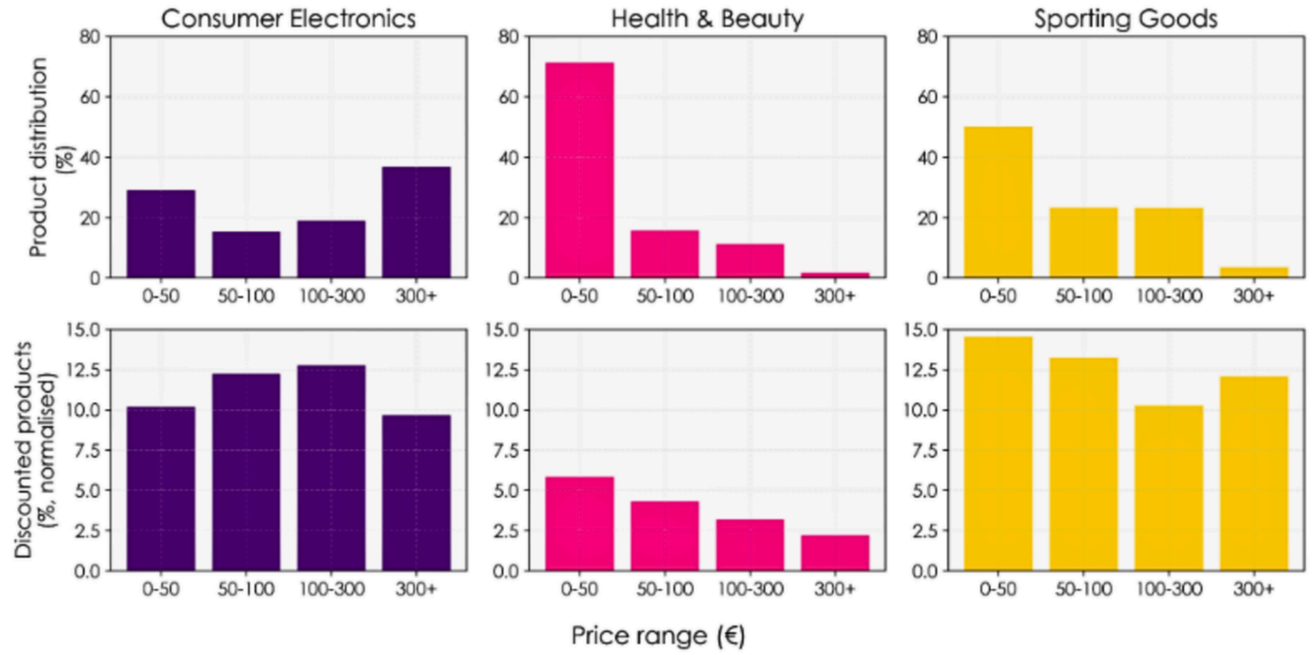
Flat for most of the window, sharp drop in the final week.

A product cut in small steps builds a price history that each next discount is measured against.

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Black Friday Insights

Discounts spread across every price tier



Top: share of catalogue per price range. Bottom: discounted products, normalised. Black Friday 2025.

37%

of tracked electronics sits above €300. Every tier was discounted at about the same rate once normalised.

~50%

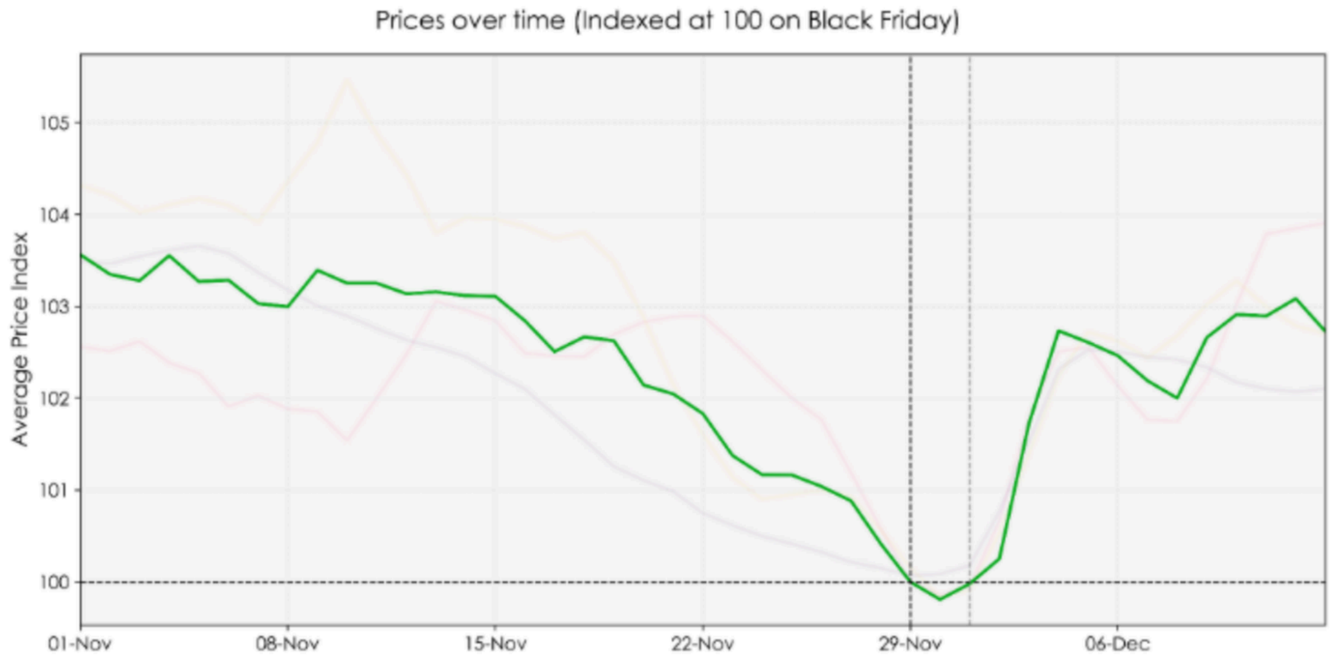
of sporting goods and 71% of health & beauty sit under €50, where most cuts landed.

This year we expect the entry tier to break the pattern: memory costs leave budget devices the least room to cut.

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Black Friday Insights

Prices slide early, recover within a week



Average price index across all three categories, 100 on Black Friday 2025.

2+ weeks

before Black Friday, prices started moving down. Omnia saw the same pre-event slide around Prime Day 2026.

102–103

index level reached within about a week, most of it around Cyber Monday.

Plan the recovery as carefully as the drop: schedule step-backs from Cyber Monday.

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Black Friday Insights

Competition flattens discounts



10–20% where products with dozens of competing offers cluster

40–60% cuts appear almost only on products with few competing offers

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THE BRAND VIEW · PHILIPS

Electronics discount claims run deeper

40–50%

discount claims in electronics

20–30%

discount claims in fashion and sports

Edoardo Passerini runs D2C pricing for Philips Personal Health in 14 countries. In electronics, he sees brands putting something from every category on offer, which is why discounts spread across every price range.

Watch the full interview

Marketplaces, Comparison Sites and Agents

Who sets the electronics price now

GOOGLE SHOPPING

€460m

DMA fine in July. Google then pulled organic Shopping results across the EEA in mid-September.

AMAZON.DE

Jan 26, 2027

Federal Court hearing on the price-control ban. Until then, Amazon.de works as it did last year.

JD.COM

Nov 3

JD.com cleared the last hurdle to take over MediaMarkt owner Ceconomy. Expect more promotions outside November.

AI ASSISTANTS

+130%

AI-referred clicks to US retail sites forecast by Adobe. About 43% of ChatGPT shopping chats compare options.

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Forecast

Our 2026 electronics pricing forecast

PREDICTION	CONFIDENCE	BASED ON
Shoppers spread purchases across November; the run-up week keeps growing	High	iDEAL 2023–2025
Electronics prices drift down from early November, no sharp late drop	Medium	Omnia Black Friday 2025 data
Entry-level laptops and smartphones get fewer, shallower cuts	Medium	Gartner, Currys, our read
Hero SKUs settle at 10–20% off; deeper cuts on less-compared lines	Medium-high	Omnia competition data
Prices recover by about Dec 7	Medium	Omnia price index, 2025
US electronics discounts peak near 30%, best on Cyber Monday	Medium-high	Adobe 2026 forecast
Gaming and computer hardware stay among Europe's strongest categories	Medium	Ceconomy Black Season
Germany stays the softest big European market for electronics	Medium	Ceconomy; Bain +2.0%
Cheap cross-border accessories put less pressure on EU prices	Low-medium	New EU duty and fee
More EU scrutiny of strike-through prices	High	ACM: 18 of 24 sellers

Pricing Playbook

Eight steps for brands and retailers

01
Map the 30-day window for every step down

Oct 28 for a Black Friday price, Oct 2 for a cut starting Nov 1.

02
Audit any autumn price increase

A later discount is measured against the lowest price of the 30 days before it.

03
Protect the entry tier

Use bundles, accessories or vouchers before cutting the device price.

04
Match the market on hero SKUs

Discounts cluster at 10–20%; going deeper buys little extra visibility.

05
Use less-compared lines for headline deals

Previous-generation models and own-brand accessories are natural candidates.

06
Watch comparison sites as closely as competitors

Check your ranking on idealo, Tweakers, Kieskeurig and Beslist.

07
Plan the recovery and the second peak

Step back from Cyber Monday, then plan Sinterklaas and the last weekend before Christmas.

08
Make product data agent-readable

Model numbers, specs, price, stock and delivery times are what an AI assistant lines up.

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Talk to one of our consultants about dynamic pricing.

Request a demo

Sources: Omnia Retail Black Friday 2025 data, iDEAL, NIQ, Thuiswinkel Markt Monitor, ACM, HDE, Barclays, Sensormatic, JD Sports, On, Dick's Sporting Goods, Adobe, PwC.