# GfK´s VIP Luncheon

Charting the Course: Navigating 2024's Distribution Trends

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Global Lead Distribution Partners

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Key Account Manager Distribution Partners

Overall, what macro themes will impact markets in 2024?

- **Geopolitical Tension** Inhibits Global Trade, Supply Chains, and Collective Goals - Regional Disparities in Growth and Inflation Persist Worldwide

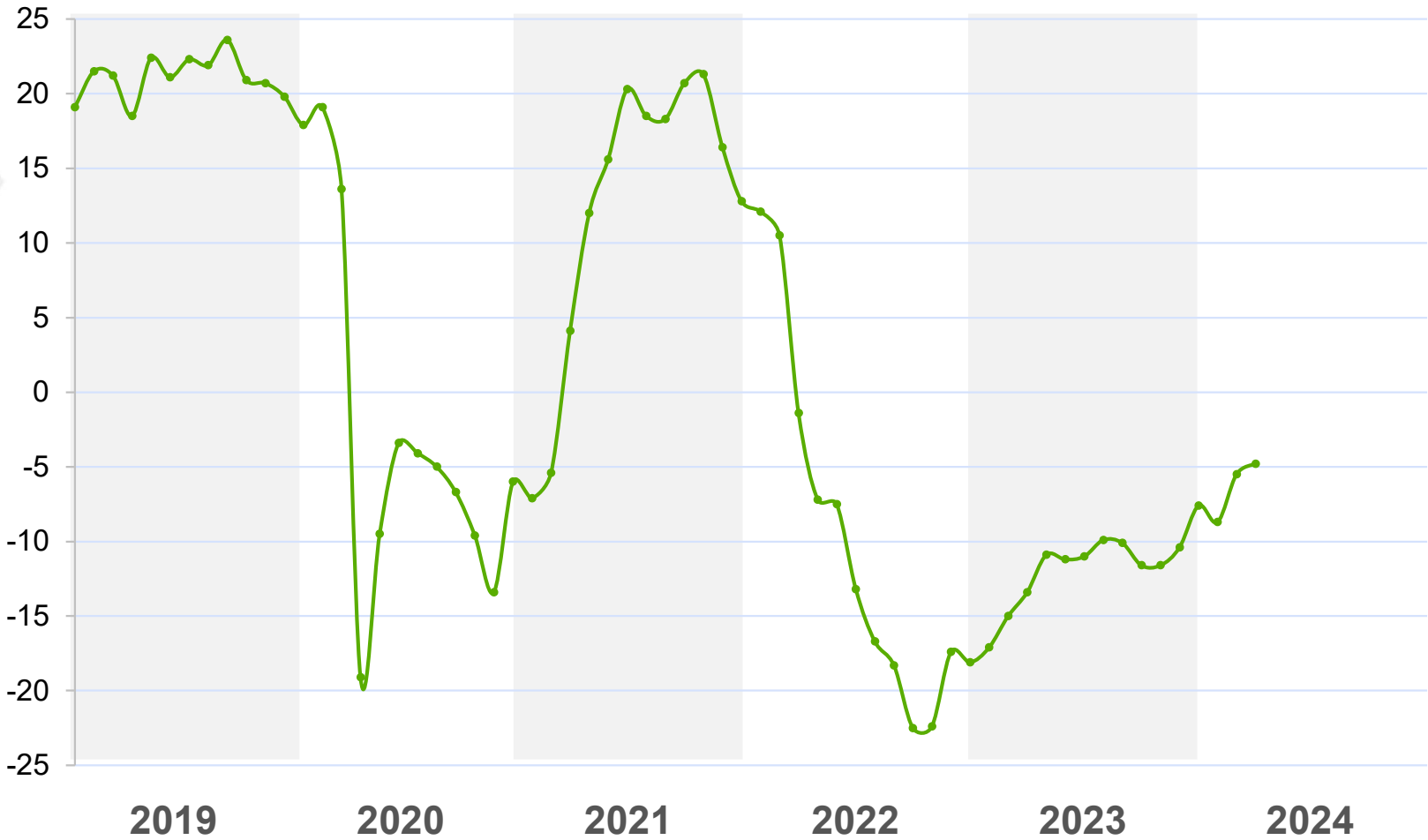- **China's** Economic **Outlook Dampened by Deflation**, Real Estate Crisis, Poses Global Spillover Risk

Global divergence

Inflation

Macro Themes

China's economy

Low Investment, low growth
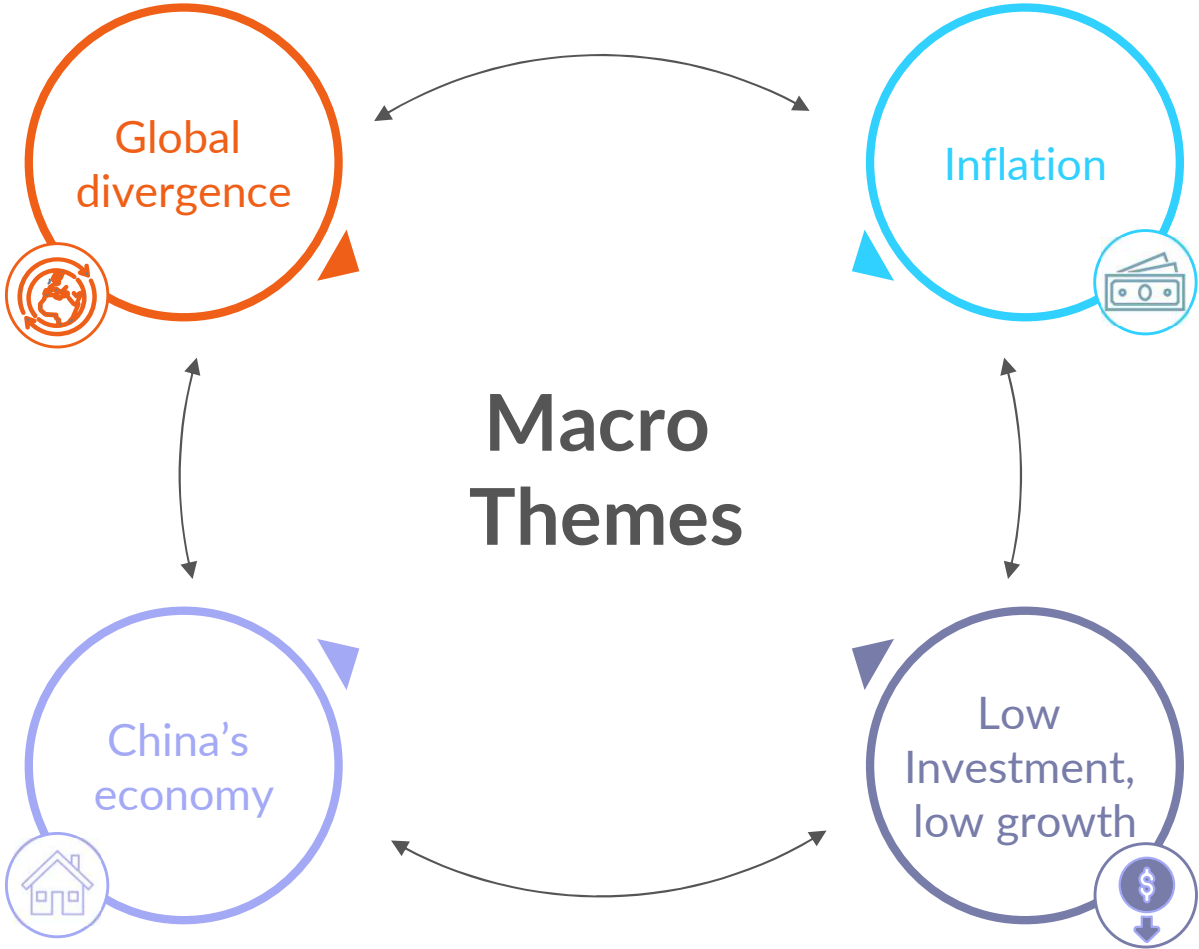
- **Inflation to Decline** Steadily in 2024, Remains Above Targets Across Economies, Targeted by Mid-2025.

- **Global Economy** Slowly **Recovers** Amid Pandemic Fallout, **High Interest Rates**, Expected Rate Drop in Late 2024 to Ease Mortgage Burden

European Consumer Climate goes up for the second time in a row

Consumer Climate EU 27 – March 2024

European distributors experience revenue decline in Q1/2024.

LATAM as only region showing growth compared to Q1/2023

Sales Value USD / Jan-Mar 2024 vs. 2023

$22.2bn
-9%
WEU

$3bn
-2%
CEE

$0,4bn
-42%
CIS

$1.6bn
+10%
Latin America

$27.3bn
-9%
Europe (Total)
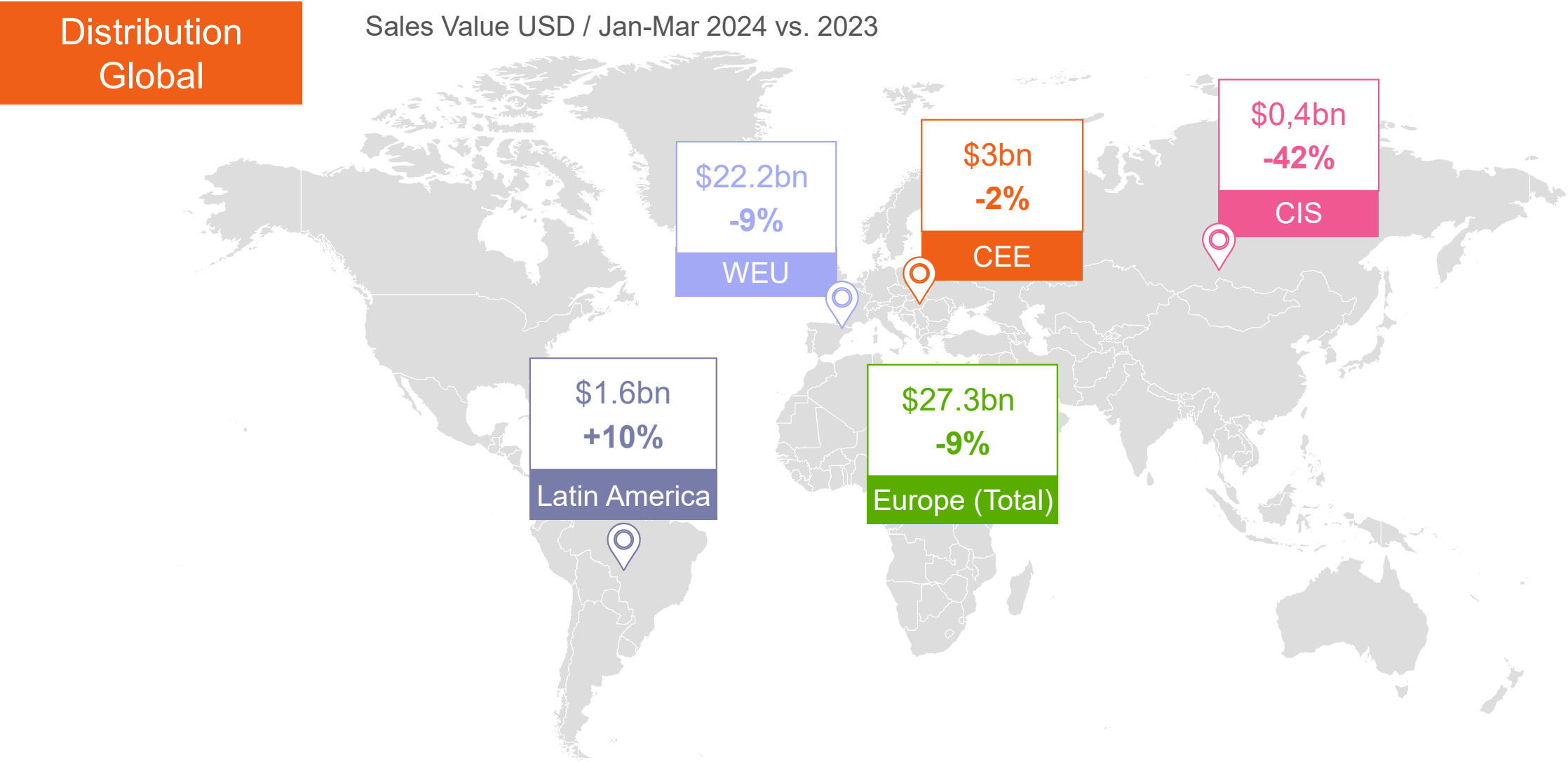
Source: GfK MI: Supply Chain, Global excl. RU, North America & Canada, Sales Value USD, all channels & product groups, Periods until March 2024

NIQ GfK

In Q1/ 2024 global distribution increased by 1.7% in sold Units

However, growth driver in units mainly caused by software sales

Q1 Sales Units in Mio.

+1,7%

Jan-Mar 2020	Jan-Mar 2021	Jan-Mar 2022	Jan-Mar 2023	Jan-Mar 2024
558	578	609	552	561

■ Sales Units in Mio.

Q1 Sales Value in bil. EUR

-10%

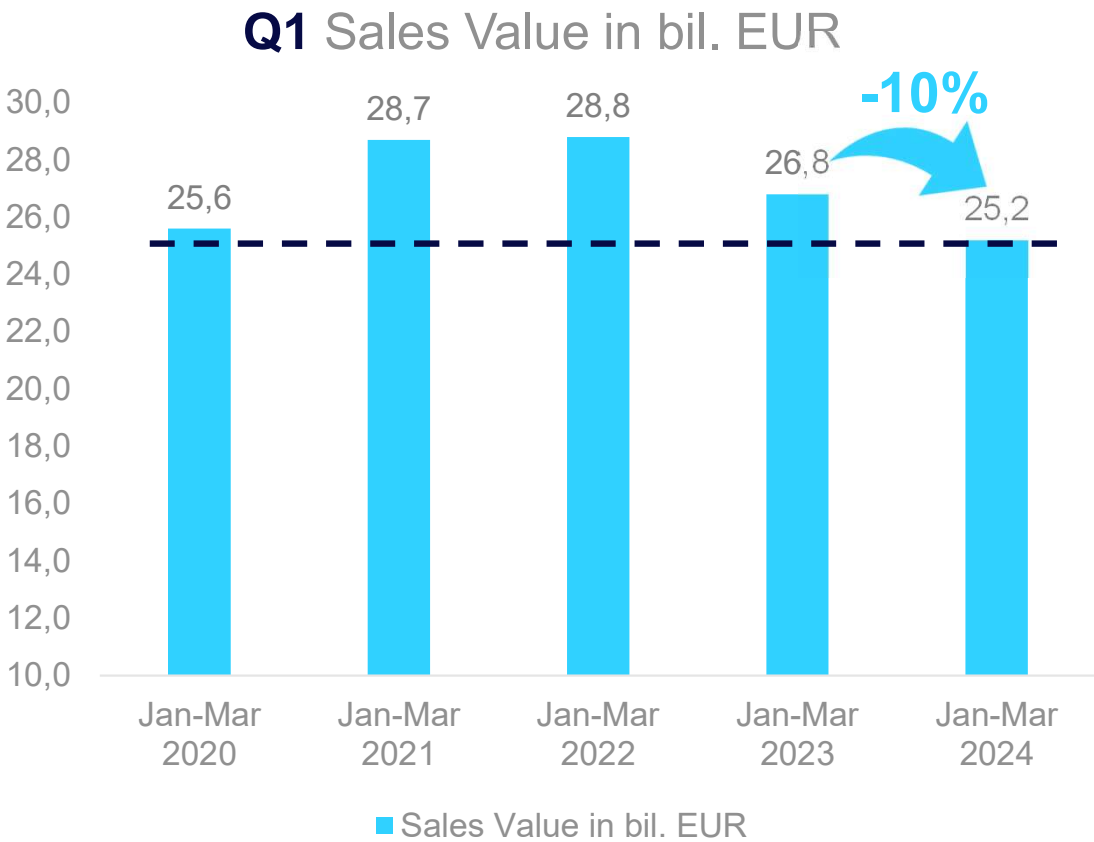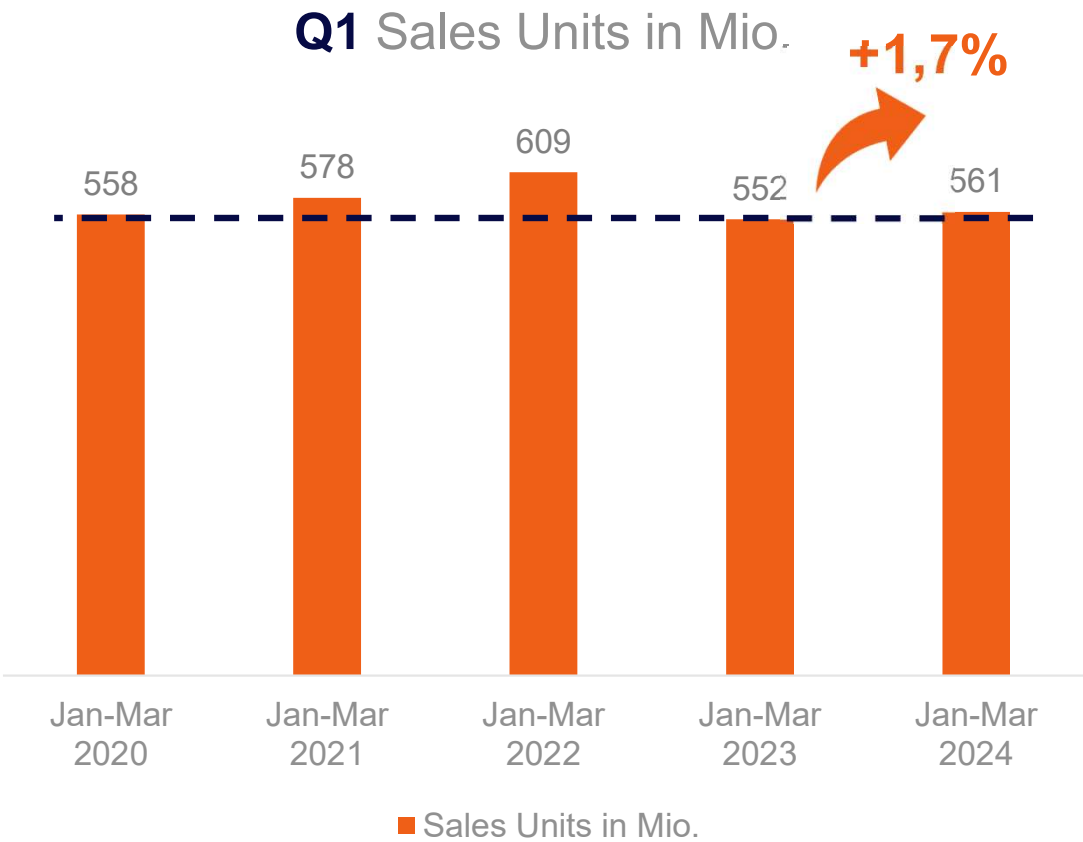| Jan-Mar 2020	Jan-Mar 2021	Jan-Mar 2022	Jan-Mar 2023	Jan-Mar 2024
25,6	28,7	28,8	26,8	25,2

■ Sales Value in bil. EUR

Source: GfK MI: Supply Chain, Global excl. RU, North America & Canada, Sales Units & Sales Value USD, all channels & product groups, Periods until March 2024

NIQ GfK

B2B Distribution Continues to Command over 50% Share

Yet, B2B Business Slips Further than Consumer Business in Q1 2024

EUROPE Distributors
Sales Value EUR

	Jan21- Mar21	Jan22- Mar22	Jan23- Mar23	Jan24- Mar24
+/- % PY	12,1	0,7	-6,8	-10,6
+/- % PY DIS-B2C	17,5	-5,5	-8,6	-9,6
+/- % PY DIS-B2B	7,9	5,6	-5,6	-11,6
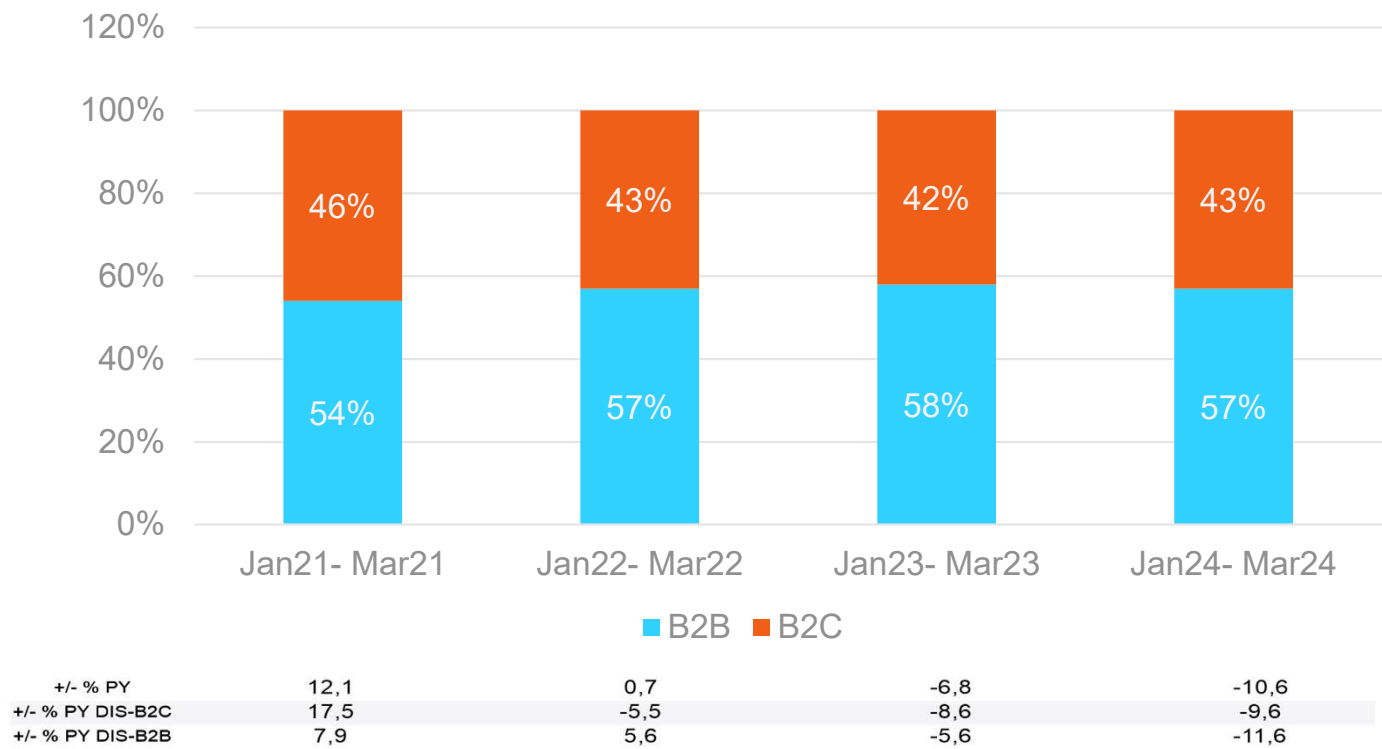
Growth Rates
Q1 2023 vs. Q1 2024

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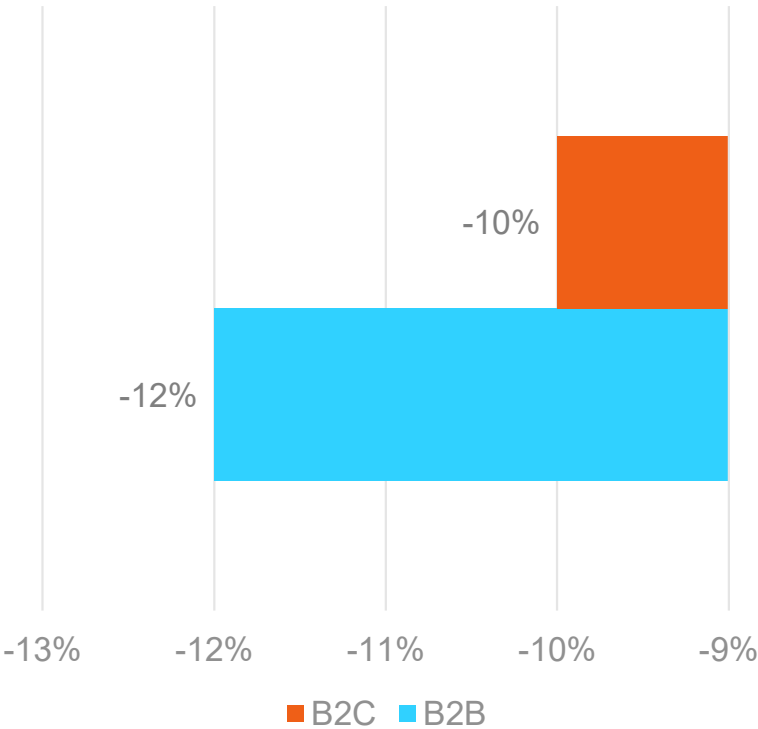
Growth rates indicate decline across all sectors in Q1 2024

Q1 showed growing IT share

Distribution Europe

Sales Value in EUR

Growth rates PY Q1

-9%

-15%

-13%

-17%

	Jan-24	Feb-24	Mar-24
IT	62%	62%	66%
Office	8%	9%	8%
Telecom	18%	17%	14%
CE	2%	3%	3%
Other	10%	10%	10%

■ IT ■ Office ■ Telecom ■ CE ■ Healthcare & Lifestyle ■ Other
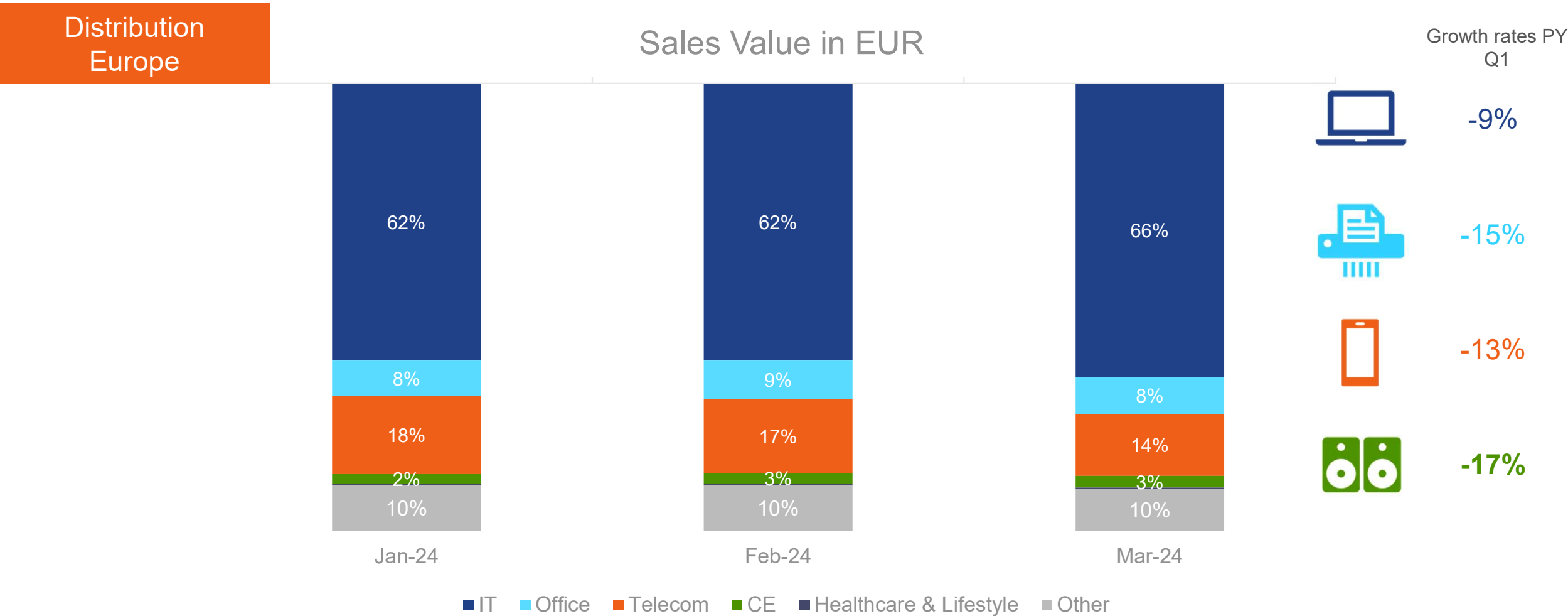
Source: GfK MI: Supply Chain, Europe, Sales Value in EUR, all channels & product groups excl. services, Periods until March 2023

Sell-through B2B declining more then B2C across various categories

Software as only growing category

EUROPE Distributors

Jan 24-Mar 24
Sales Value EUR wo. VAT,Growth Rate PY

Category	DIS-B2C	DIS-B2B
MOBILE COMPUTING	-6,6	-11,2
SOFTWARE	3,8	3,8
DESK COMPUTING	-16,1	-23,9
COMMUNICATION DEVICES	-18,8	-28,4
STORAGE	-2,4	-23,6
MONITORS	-8,1	-11,0
MEDIATABLETS	-5,1	-15,6
HARDWARE COMPONENTS	-6,7	-19,4
MULTIMEDIA DEVICES	-12,1	-0,5
POWERMANAGEMENT	-10,4	-5,2
KEYING DEVICES	-10,0	-11,9
POINTING DEV	-18,3	-17,3
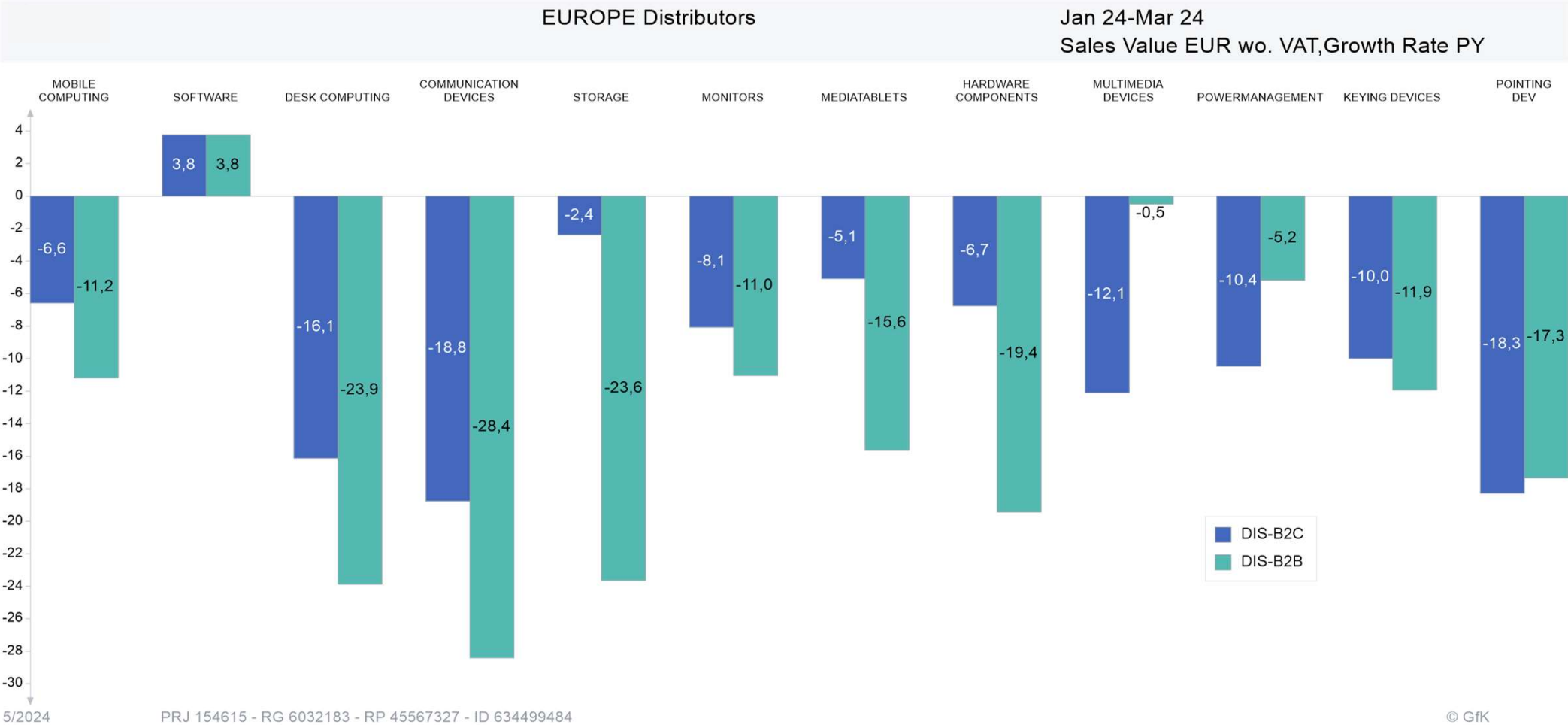
Software Landscape: Dominance of Application and Collaboration Solutions

Growing Importance of Monitoring and Networking Software

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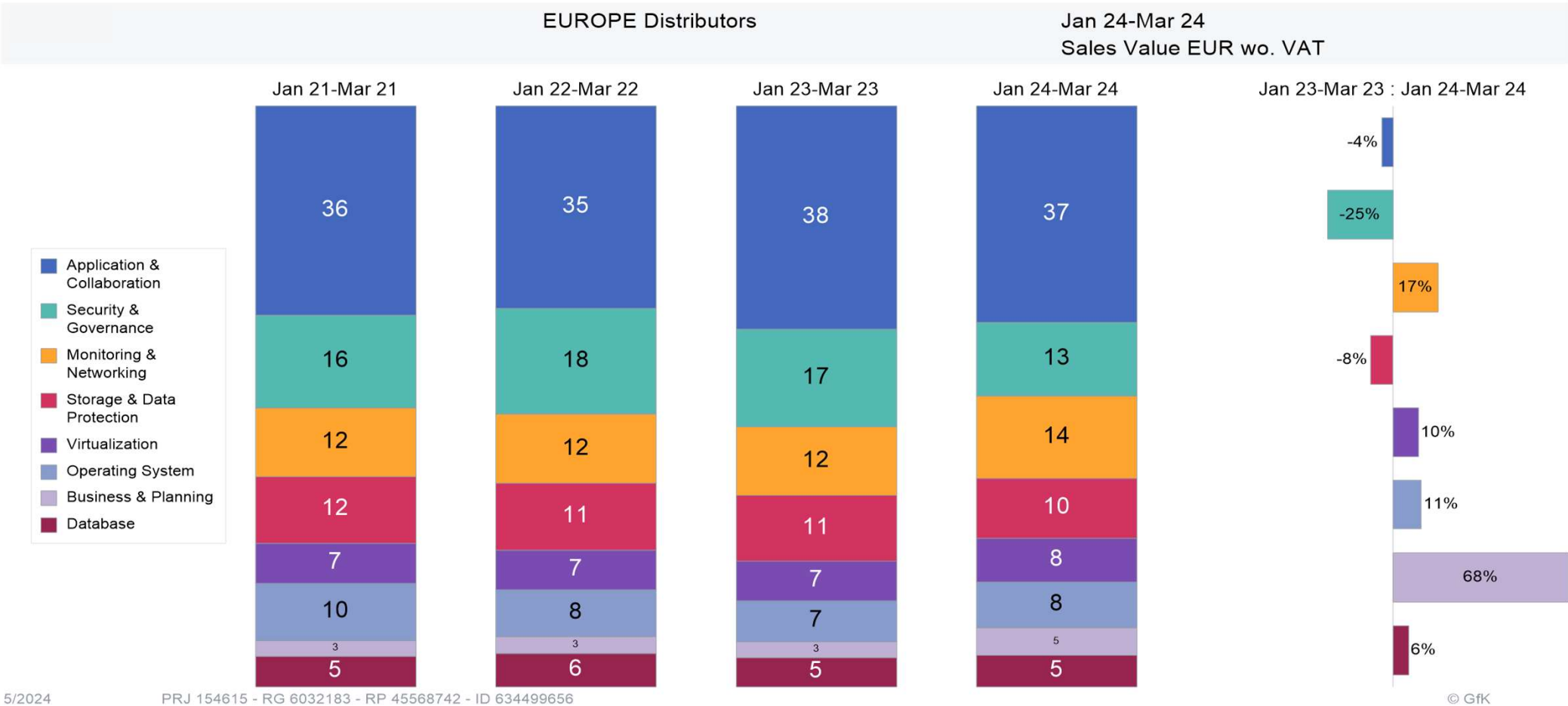
Core Wearables Maintain Relevance Among Top Telecom Categories

Q1 2024: Mobile Enhancement Business Witnesses ~30% Revenue Decline

Telecom

EUROPE Distributors Jan-Mar 24
Sales Value wo. VAT, Growth Rate

- Smart-Mobilephones: B2C -14%, B2B -15,80%
- Headphones/Headsets: B2C -13,50%, B2B -13,90%
- Core Wearables: B2C -4,90%, B2B -3,20%
- Mobile Enhancement: B2C -29,10%, B2B -28,60%
- Phone Devices: B2C -20%, B2B -1%

■ B2C ■ B2B
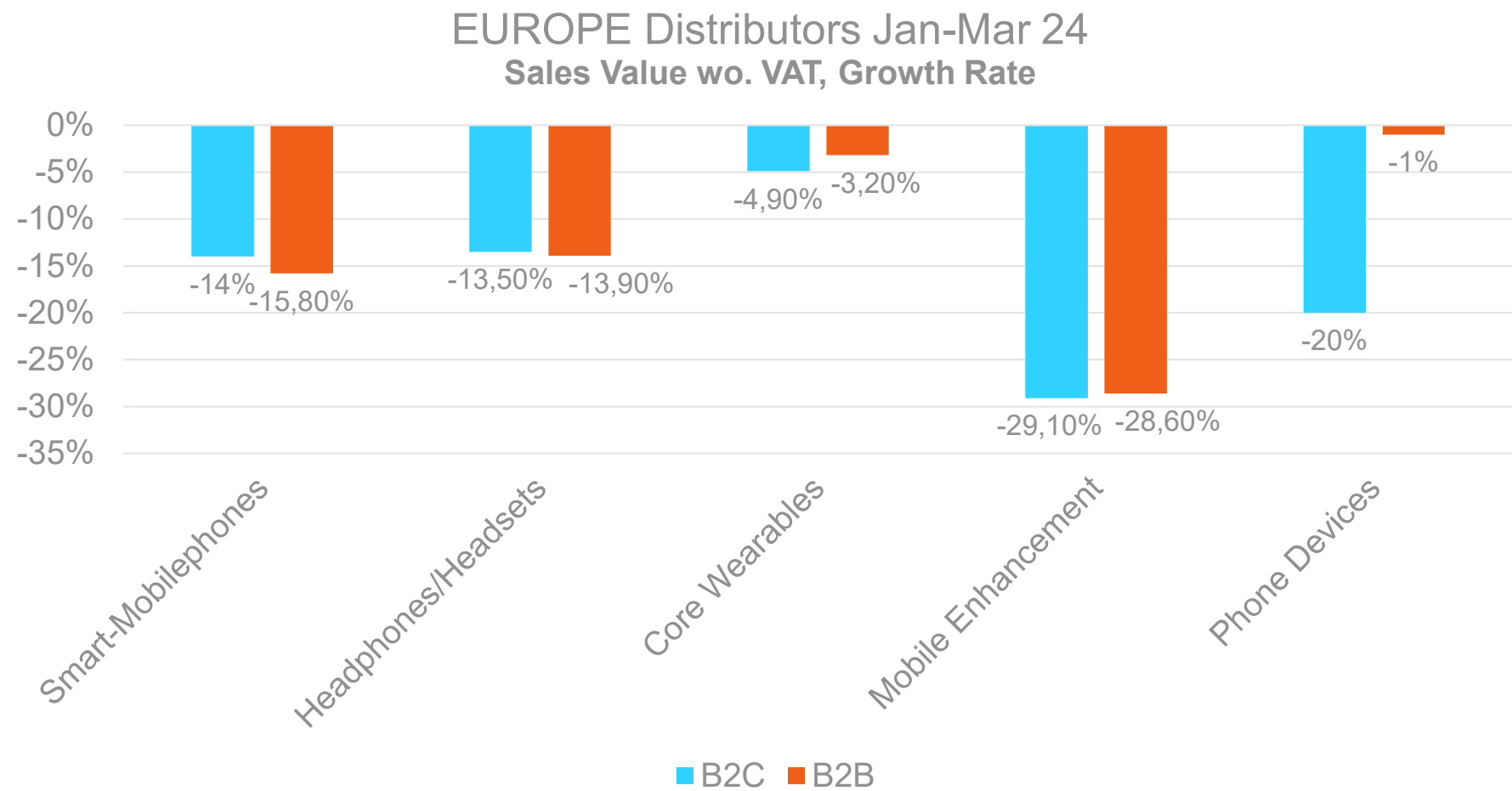
Action Cams show some significant growth for the EU distribution market

Mostly Driven by the German Distribution Market

EUROPE Distributors Jan-Mar 24
Sales Value wo. VAT, Growth Rate

■ B2C ■ B2B

Category	B2C	B2B
Television	-20,70%	-12,70%
Video Player/REC	1,30%	2,30%
Camcorder	40,10%	80,50%
Audio Home Sys	-46,20%	-37,70%
Loudspeakers	-11%	7,80%
Docking/Mini Speaker	-18,90%	-15,30%
Car Navigation	-29,70%	-3,90%

16 Mio. → 23 Mio.
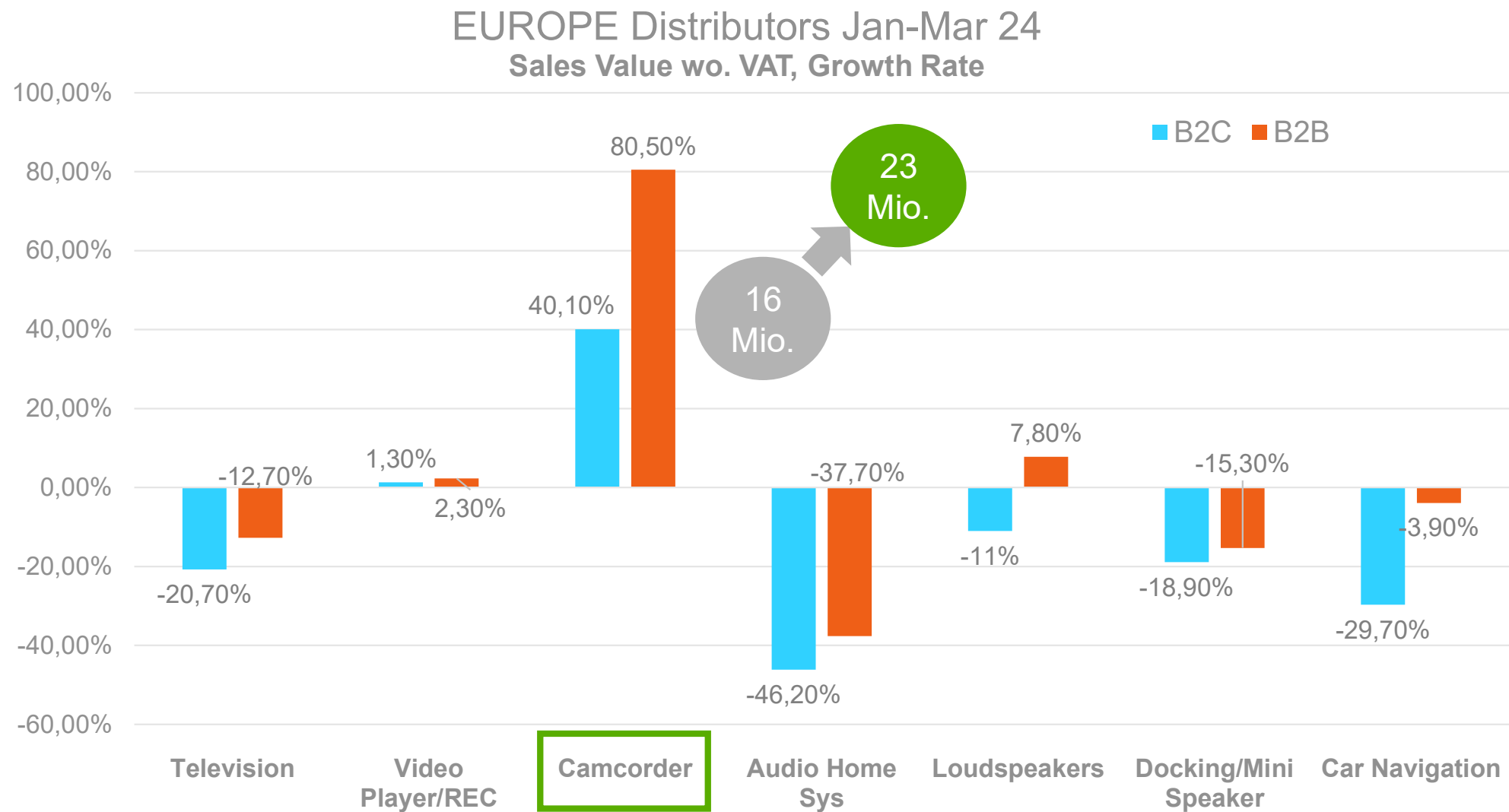
The Advantages of B2C Sales Channels for Varied Brand Offerings

Leveraging Diversified Portfolios to Navigate the B2C Landscape

Europe Distributors
Number of different Sell. Brands NE,C

Legend: —— IT Total   —— IT- DIS B2C   —— IT- DIS B2B

X-axis: Jan-Dec2019, Jan-Dec2020, Jan-Dec2021, Jan-Dec2022, Jan-Dec2023

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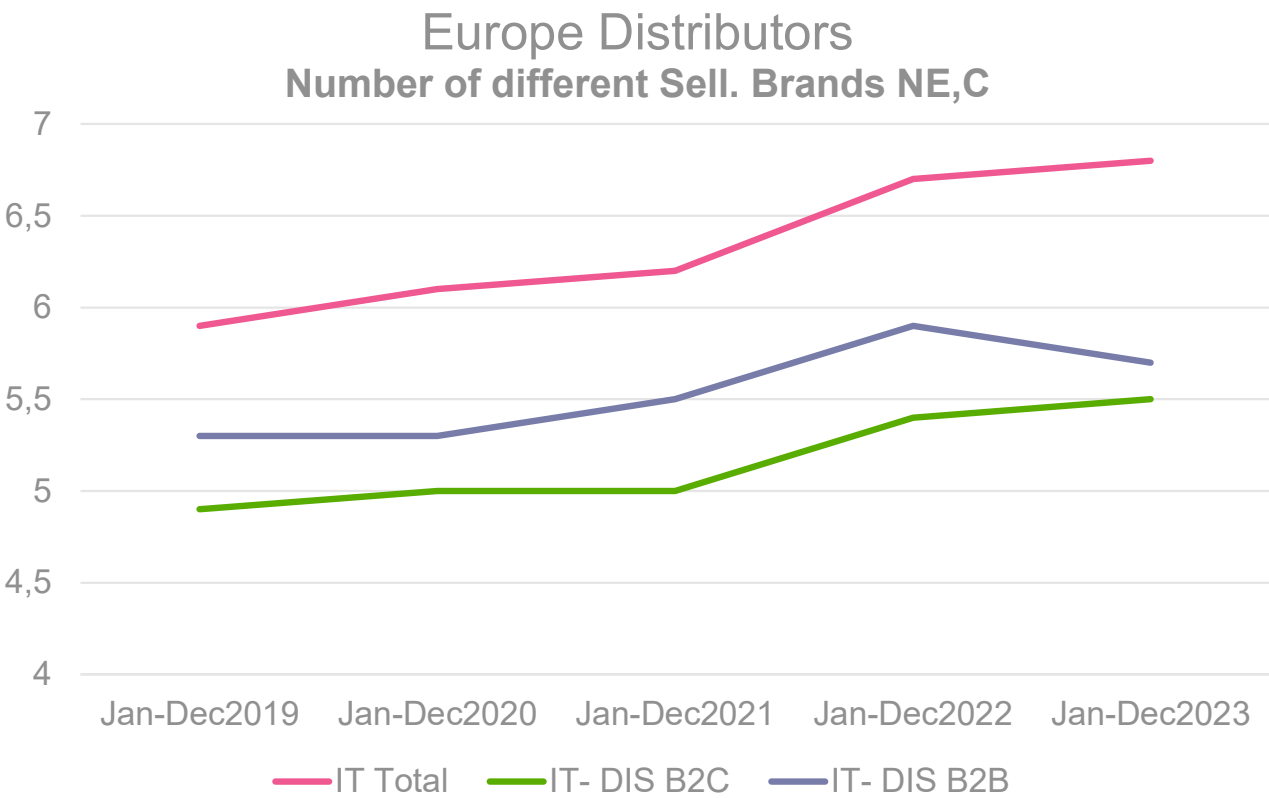
Turning Endings into Beginnings:

How Windows 10 End of Life can drive increased demand for IT Hardware

Businesses should start transitioning now to avoid potential issues down the line

Windows 10 End of Support

Timeline to Windows 10 End of Support

| 2022 | 2023 | 2024 | 2025 |

No new features, only Security updates until EOS

Assess hardware & applications readiness; pilot deployment and plan infrastructure

TOO LATE TO START
Only 1 year left to complete full Windows 11 migration, manage HW refresh and deployment

Windows 10 will be out of servicing. No further security updates

Windows 10:
A cornerstone of many businesses' IT infrastructure since its release.

End of Support:
Microsoft announced the end of support for Windows 10, scheduled **for October 14th, 2025.**
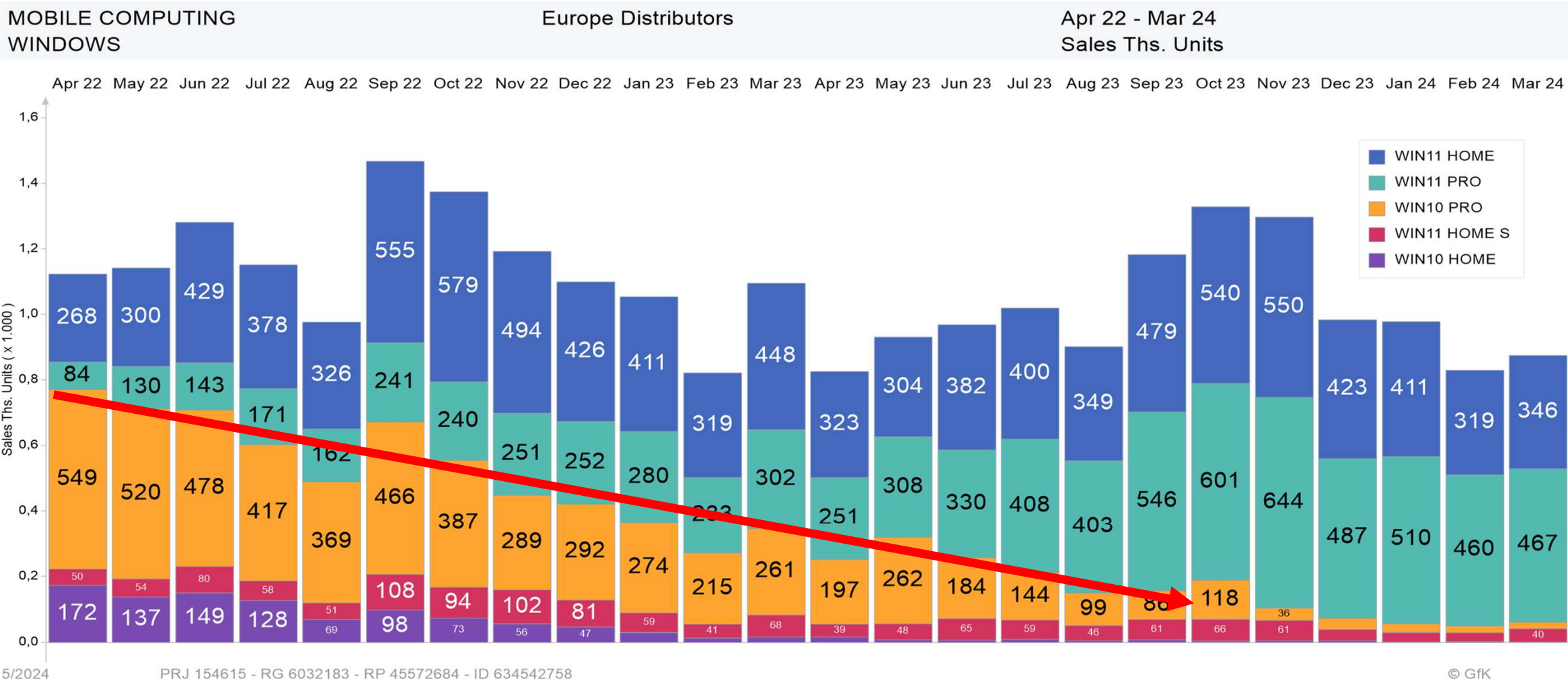
Business Impact:
After this date, Microsoft will stop providing security updates or support for Windows 10.

Vulnerabilities:
Businesses will be exposed to potential cyber threats without ongoing support.

Sales of Windows 11 Pro Sales Have Been Taking Over

Windows 10 Pro Phasing Out as End-of-Life Looms; Buyers Shift Focus Ahead of 2025 Deadline

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Why Businesses Should Consider Upgrading:

Ensuring Compatibility with AI-Powered Systems

Windows 11 introduces new features like Copilot, leveraging AI for enhanced productivity

Hardware Compatibility

- These features may require compatible hardware for optimal performance.

Performance Considerations

- While older notebooks may run Windows 11, their performance with AI-intensive tasks may be limited.

- Upgrading to newer notebooks with more powerful hardware can improve performance and efficiency.

Future Proofing

- Investing in newer notebooks ensures compatibility with future software updates and emerging AI technologies.

- It prepares businesses for evolving demands and opportunities in the AI-driven landscape.

The Need for Devices with Enhanced Performance to Optimize AI Support

Local vs. Cloud AI Processing & why new devices might be necessary

AI-Powered Devices

- Cloud AI processing
- Scalable resources
- AI algorithm updates
- E.g. Smartphones with voice assistants

AI-Enabled Devices

- Local AI processing
- Data privacy control
- Independent operation
- E.g. Edge computing devices

Why new devices could be necessary

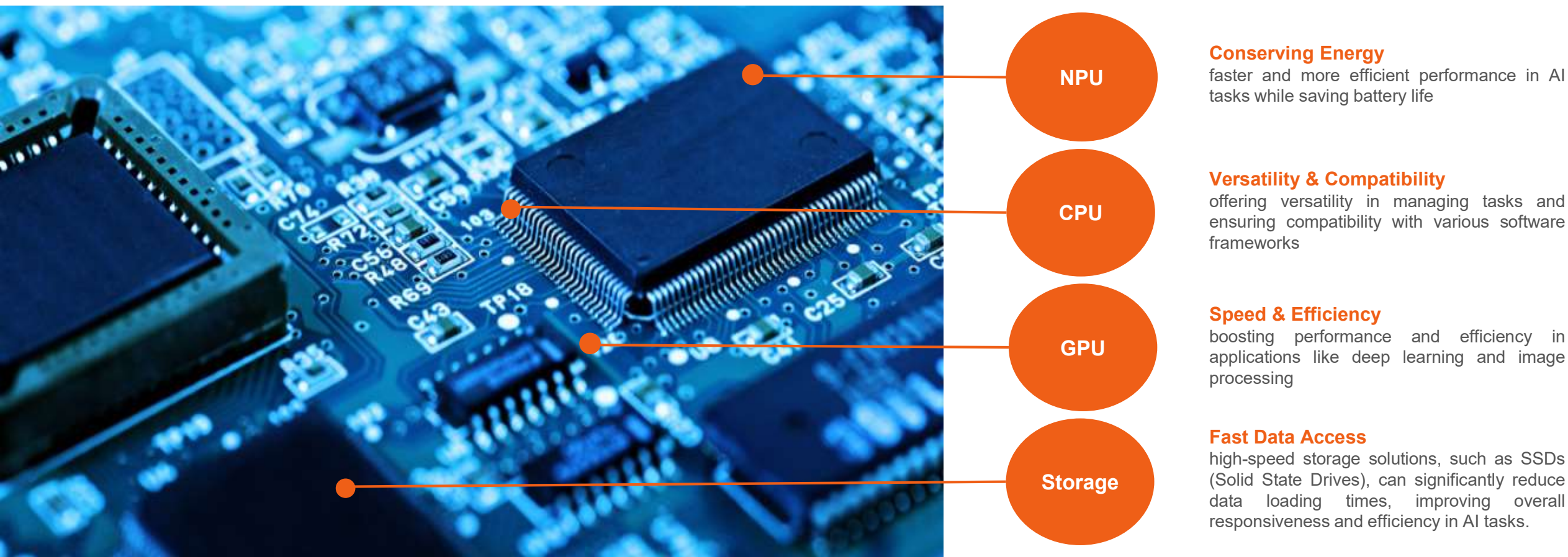Growing complexity of AI applications requires more computational power

Data privacy and security concerns necessitate high-level local processing

Integration of edge and cloud AI for optimal performance and efficiency

Empowering AI: Essential Hardware Requirements for Implementation

Accelerating IT Recovery with AI-Ready Hardware Components

NPU

Conserving Energy
faster and more efficient performance in AI tasks while saving battery life

CPU

Versatility & Compatibility
offering versatility in managing tasks and ensuring compatibility with various software frameworks

GPU

Speed & Efficiency
boosting performance and efficiency in applications like deep learning and image processing

Storage

Fast Data Access
high-speed storage solutions, such as SSDs (Solid State Drives), can significantly reduce data loading times, improving overall responsiveness and efficiency in AI tasks.

Maximizing Distributor Opportunities with AI-Powered Solutions

Maximizing Efficiency, Security, and Customer Satisfaction

Unlocking Business Potential with AI

- **Increased Sales Opportunities:** The transition to AI-capable PCs presents new sales opportunities, as businesses seek to upgrade their IT infrastructure to remain competitive in the digital era.

- **Value Added Services:** Offering value-added services such as installation, training, and support for AI-capable PCs, further enhancing their offerings and strengthening customer relationships.

- **Enhanced Market Position**: By embracing AI technology and offering cutting-edge solutions, you can differentiate yourselves in the market and position yourself as leaders in the rapidly evolving IT landscape.

- **Enhanced Product Offerings:** Expanding your product portfolio to include AI-capable PCs, catering to the growing demand for advanced computing solutions among businesses.

> "AI-powered solutions isn't just the next step in the evolution of the PC—It's the next step in rethinking the workplace"

Employees welcome methods that streamline their workday and enable them to create a greater impact

80%

of employees express a preference for AI to summarize their meetings, action items, and assist in planning their day.*

*Source: Will AI fix work? Work trend index annual report, Microsoft, May 9, 2023.

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Average age of laptops has been decreasing since 2020

The 2020/2021 purchase boom brings laptops to the end of their life cycle

Age of Previous Product

○ TV   ○ Smartphone   ○ Laptop   ○ WM

	CY 2019	CY 2020	CY 2021	CY 2022	1HY 2023
WM	7,21	7,16	7,06	7,03	7,04
TV	6,48	6,50	6,47	6,28	6,34
Laptop	5,48	5,59	5,39	5,21	5,38
Smartphone	2,32	2,40	2,48	2,52	2,58

Countries: Austria, Belgium, Brazil, Chile, France, Germany, Great Britain, Greece, India, Italy, Japan, Netherlands, Poland, Portugal, Russian Federation, Spain, Switzerland, Turkey
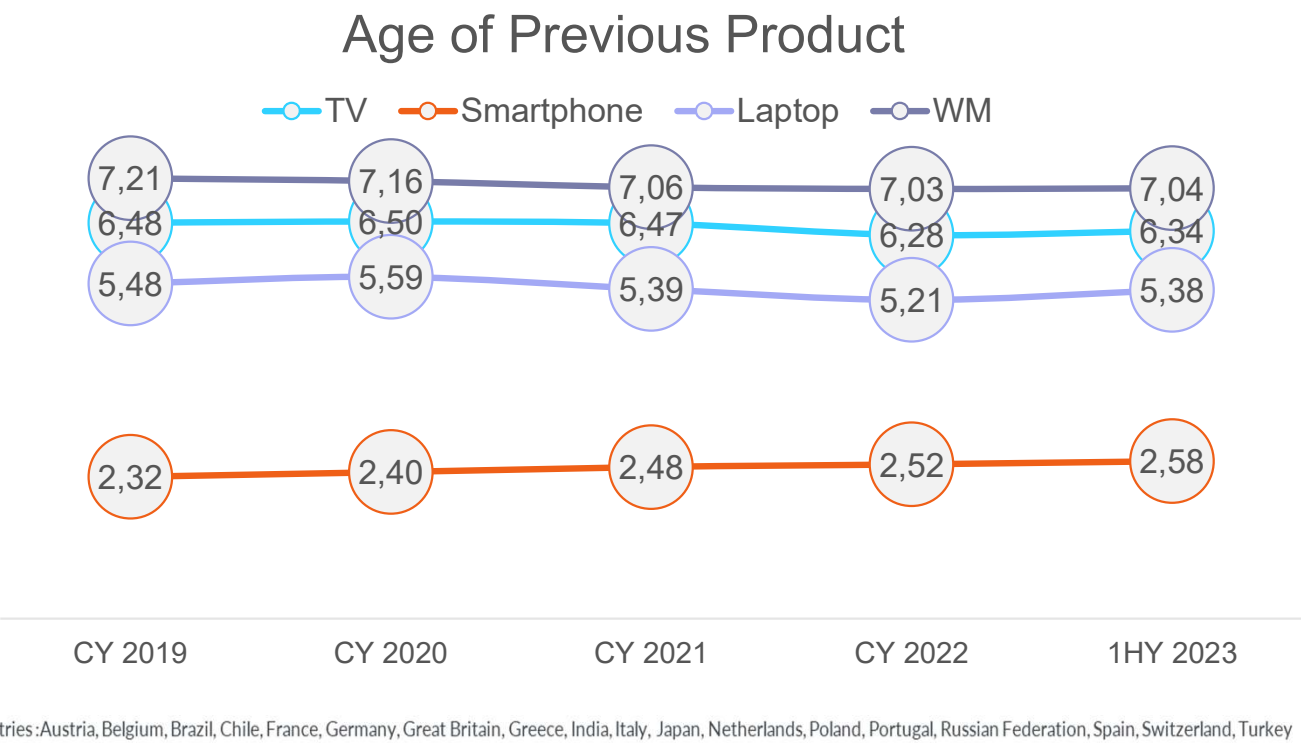
What are the main purchase drivers for AI laptop PC?

Productivity and Task Efficiency As Main Drivers

% respondents

Driver	%
Productivity/task efficiency	55
High-spec hardware	48
Offline capability	44
Privacy	42
Others	5

18%

of German consumers would consider AI as an important purchase driver for the next laptop purchase

The Global Rise of AI- Ready PCs: Trends Unfolding from November 2023 Onwards

Germany Takes the Lead: Pioneering the Market for AI Equipped Computing Devices

AI PC Sales Units

Europe Distributors

Mar 23 - Mar 24
Sales Units

Legend: Germany, Great Britain, Switzerland, Netherlands, Italy, Poland, Turkey, France, Sweden, Spain, OTHERS

	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24
Germany	1.865	2.333	3.095	3.296	3.280
Great Britain	1.109	887	1.297	1.669	1.366
Switzerland	491	964	1.114	1.366	1.526
Netherlands	625	1.262	1.170	1.330	904
Italy		759	776	1.303	1.217
Poland		595	662	816	827
Turkey	1.104			510	1.368
France	498	503	586	638	884
Sweden		536	412	619	665
Spain		400	405	526	747
OTHERS	1.306	2.330	2.634	3.438	3.764

Sep 23: 600

Sales Units (x 1.000)

The Global Rise of AI- Ready PCs: Trends Unfolding from November 2023 Onwards

Germany Takes the Lead: Pioneering the Market for AI Equipped Computing Devices
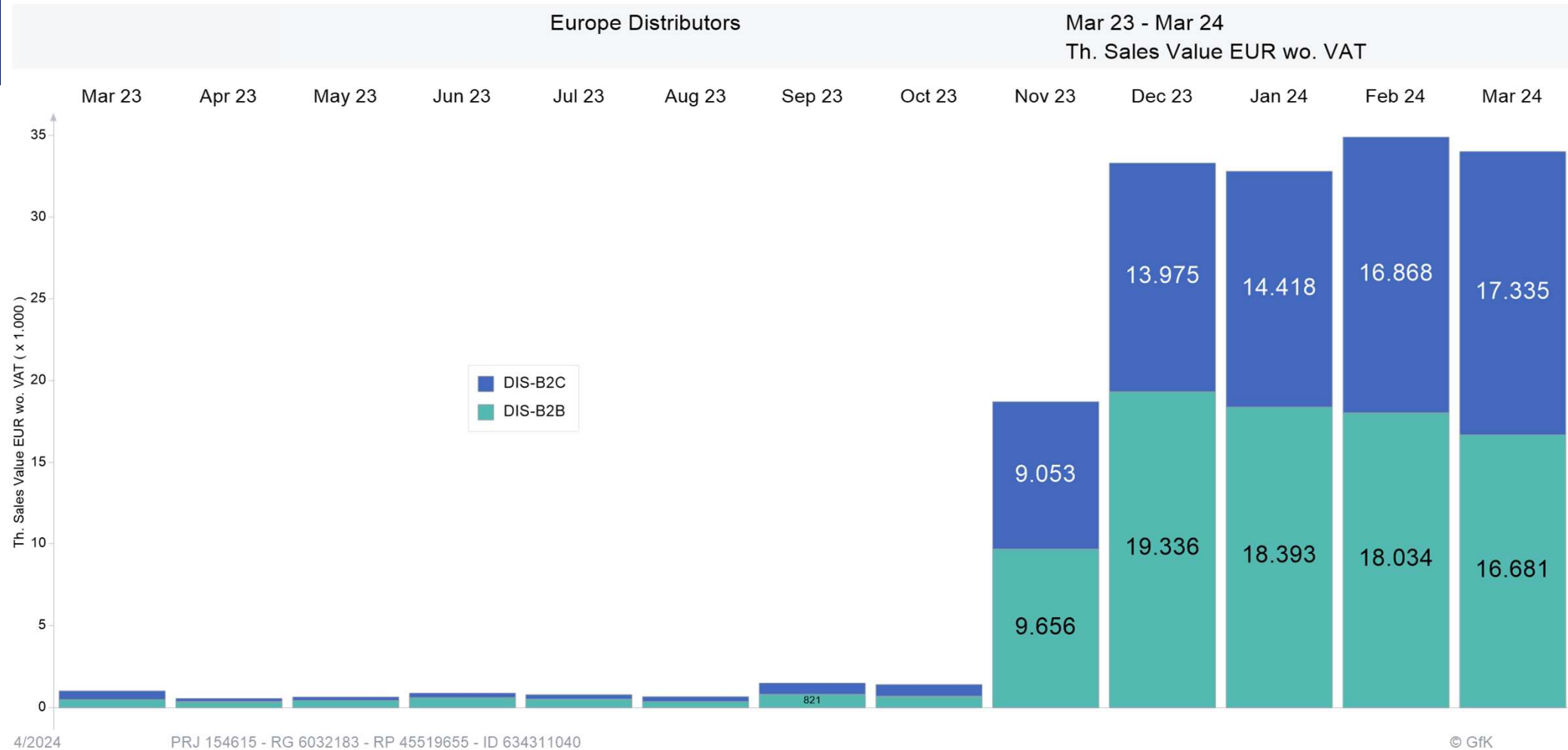

AI PC
Sales Value

Europe Distributors

Mar 23 - Mar 24
Th. Sales Value EUR wo. VAT

Legend:
- Germany
- Great Britain
- Switzerland
- Netherlands
- Italy
- Poland
- Turkey
- France
- Sweden
- Spain
- OTHERS

Nov 23: Germany 4.730, Sweden 2.781, 1.361, Netherlands 1.940, 1.116, 1.466, OTHERS 3.162

Dec 23: Germany 6.509, Great Britain 2.538, Switzerland 3.079, Netherlands 3.926, Italy 1.817, Poland 2.680, Turkey 2.236, 1.512, 1.421, 1.205, OTHERS 6.443

Jan 24: Germany 7.257, Great Britain 3.390, Switzerland 3.529, Netherlands 3.647, Italy 1.869, Poland 1.942, 1.097, 1.593, 1.052, 1.005, OTHERS 6.484

Feb 24: Germany 7.319, Great Britain 4.057, Switzerland 3.751, Netherlands 3.746, Italy 2.013, Poland 1.815, 1.486, 1.559, 1.426, 1.118, OTHERS 6.690

Mar 24: Germany 5.829, Great Britain 3.681, Switzerland 3.848, Netherlands 2.562, Italy 1.995, 1.739, Turkey 2.968, France 2.057, 1.455, 1.392, OTHERS 6.514

AI-Ready PCs in B2B: Driving Incremental Revenue Growth

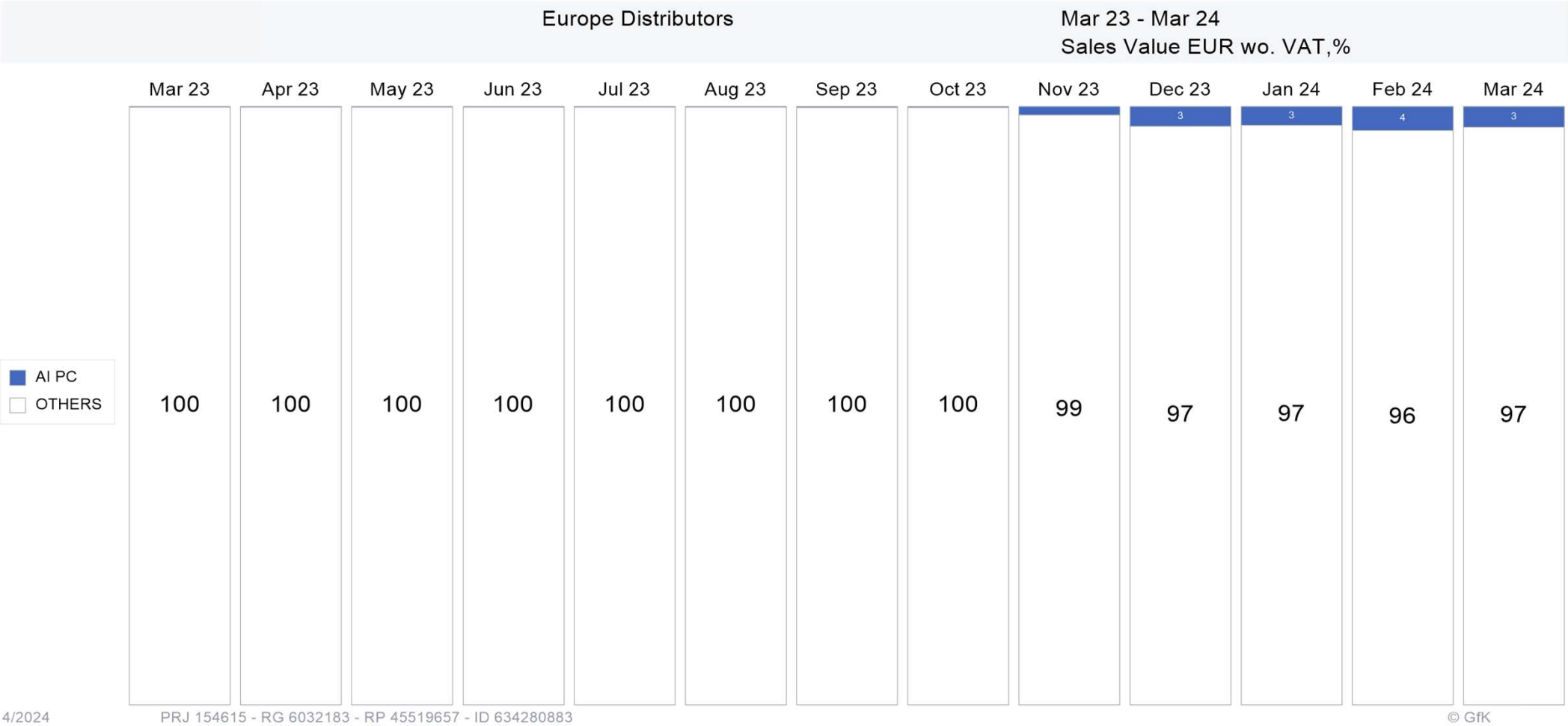Evaluating Revenue Streams: B2B Outperforms B2C in the Current Landscape

AI PC Sales Value

Europe Distributors

Mar 23 - Mar 24
Th. Sales Value EUR wo. VAT

	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24
DIS-B2C									9.053	13.975	14.418	16.868	17.335
DIS-B2B							821		9.656	19.336	18.393	18.034	16.681

Th. Sales Value EUR wo. VAT (x 1.000)

Emerging Trends: Steady Growth in Market Share Since November 2023

Anticipating Increased Market Share Throughout 2024/2025

AI PC Sales Value
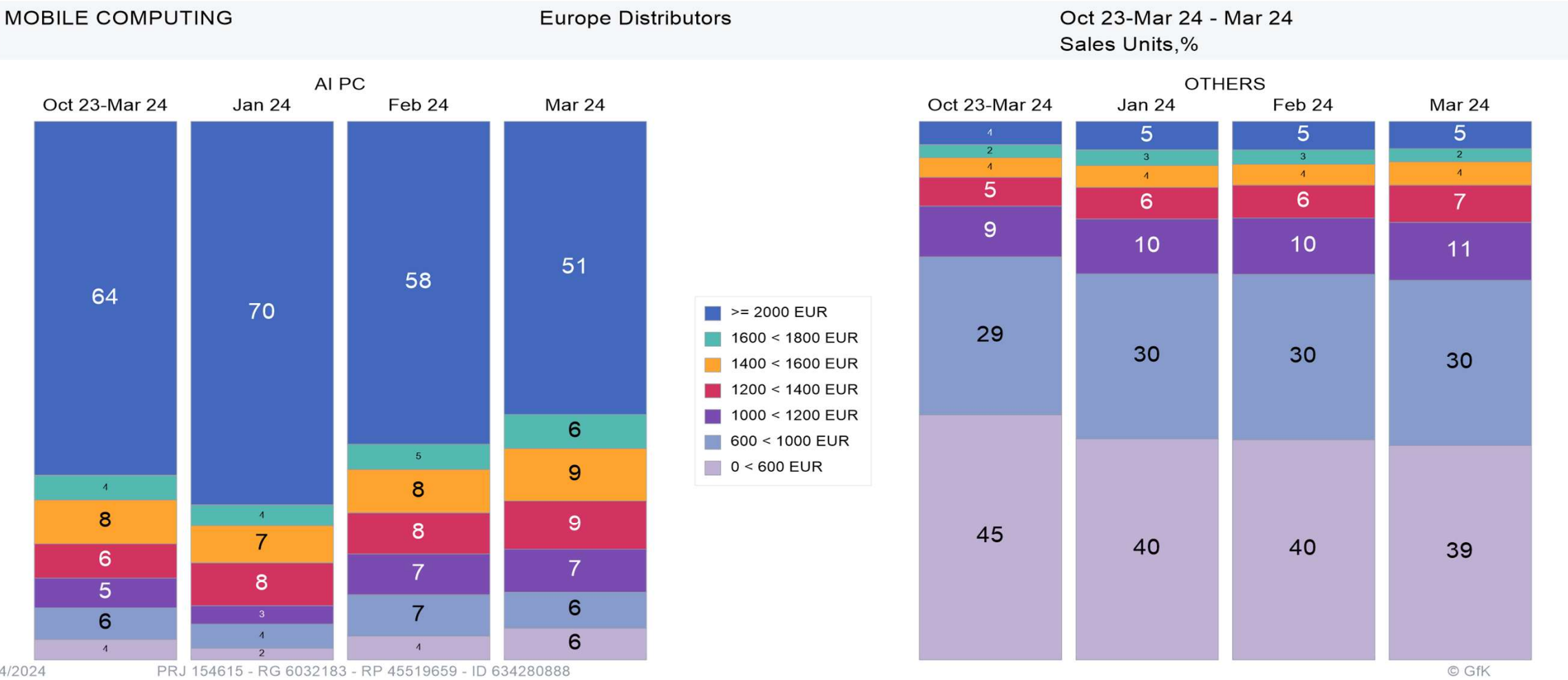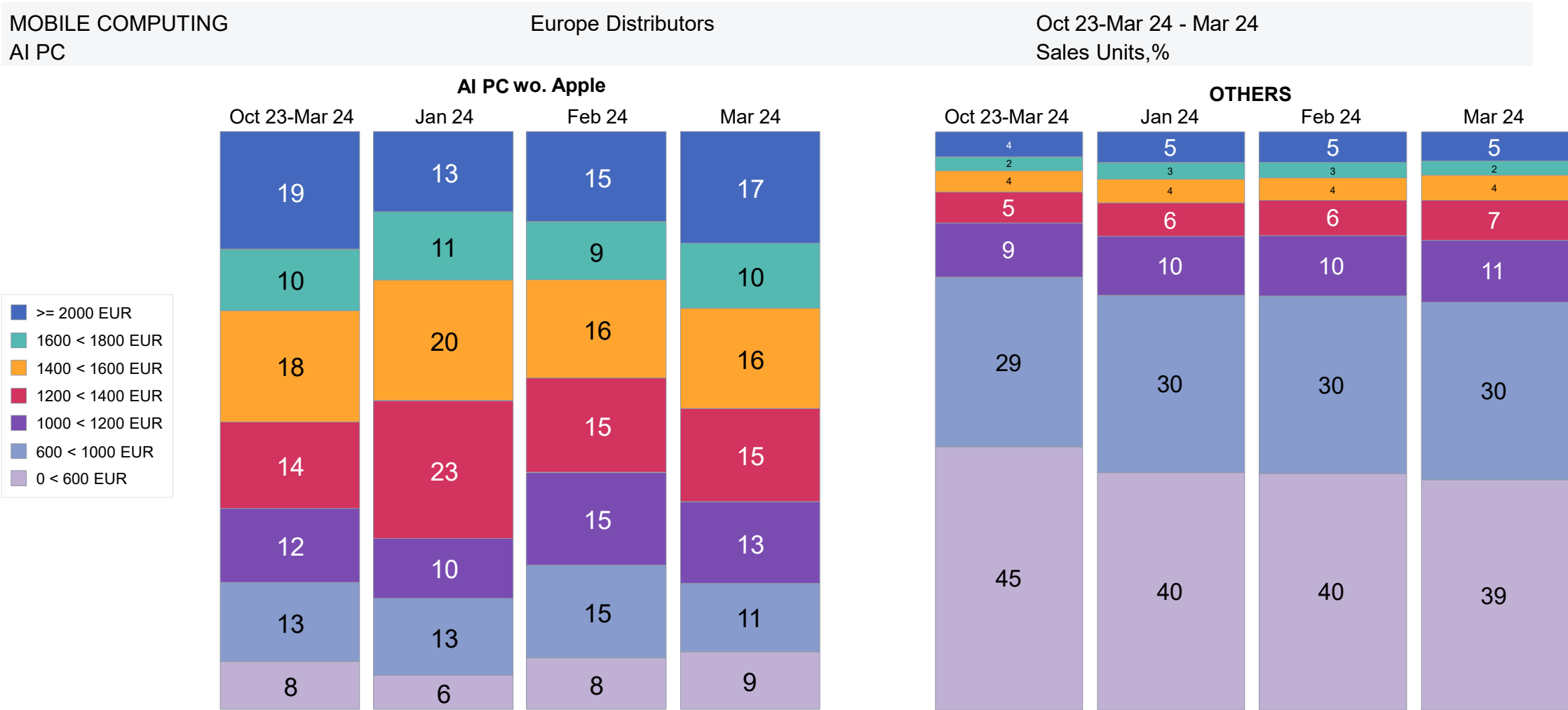
	Europe Distributors								Mar 23 - Mar 24 Sales Value EUR wo. VAT,%				

	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24
AI PC										3	3	4	3
OTHERS	100	100	100	100	100	100	100	100	99	97	97	96	97

AI-Enabled PC's Enter the Premium Product Market

Analysis including Brand Apple

MOBILE COMPUTING | Europe Distributors | Oct 23-Mar 24 - Mar 24 Sales Units,%

AI PC

Price Range	Oct 23-Mar 24	Jan 24	Feb 24	Mar 24
>= 2000 EUR	64	70	58	51
1600 < 1800 EUR	4	4	5	6
1400 < 1600 EUR	8	7	8	9
1200 < 1400 EUR	6	8	8	9
1000 < 1200 EUR	5	3	7	7
600 < 1000 EUR	6	4	7	6
0 < 600 EUR	4	2	4	6

OTHERS

Price Range	Oct 23-Mar 24	Jan 24	Feb 24	Mar 24
>= 2000 EUR	4	5	5	5
1600 < 1800 EUR	2	3	3	2
1400 < 1600 EUR	4	4	4	4
1200 < 1400 EUR	5	6	6	7
1000 < 1200 EUR	9	10	10	11
600 < 1000 EUR	29	30	30	30
0 < 600 EUR	45	40	40	39

Legend:
- >= 2000 EUR
- 1600 < 1800 EUR
- 1400 < 1600 EUR
- 1200 < 1400 EUR
- 1000 < 1200 EUR
- 600 < 1000 EUR
- 0 < 600 EUR

4/2024 PRJ 154615 - RG 6032183 - RP 45519659 - ID 634280888 © GfK

Positioning in the Upper Price Classes: The Rise of AI Capable PCs as Premium Offerings

Analysis without Brand Apple

MOBILE COMPUTING
AI PC

Europe Distributors

Oct 23-Mar 24 - Mar 24
Sales Units,%

AI PC wo. Apple

	Oct 23-Mar 24	Jan 24	Feb 24	Mar 24
>= 2000 EUR	19	13	15	17
1600 < 1800 EUR	10	11	9	10
1400 < 1600 EUR	18	20	16	16
1200 < 1400 EUR	14	23	15	15
1000 < 1200 EUR	12	10	15	13
600 < 1000 EUR	13	13	15	11
0 < 600 EUR	8	6	8	9

OTHERS

	Oct 23-Mar 24	Jan 24	Feb 24	Mar 24
>= 2000 EUR	4	5	5	5
1600 < 1800 EUR	2	3	3	2
1400 < 1600 EUR	4	4	4	4
1200 < 1400 EUR	5	6	6	7
1000 < 1200 EUR	9	10	10	11
600 < 1000 EUR	29	30	30	30
0 < 600 EUR	45	40	40	39

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Further Enhancing the Premiumization Trend with AI-Capable Devices

Offering high-end products to meet evolving consumer demands

- Elevated User Experience
- Differentiation and Innovation
- Customization and Personalization
- Long-Term and Sustainability
- Enhanced Performance and Efficiency
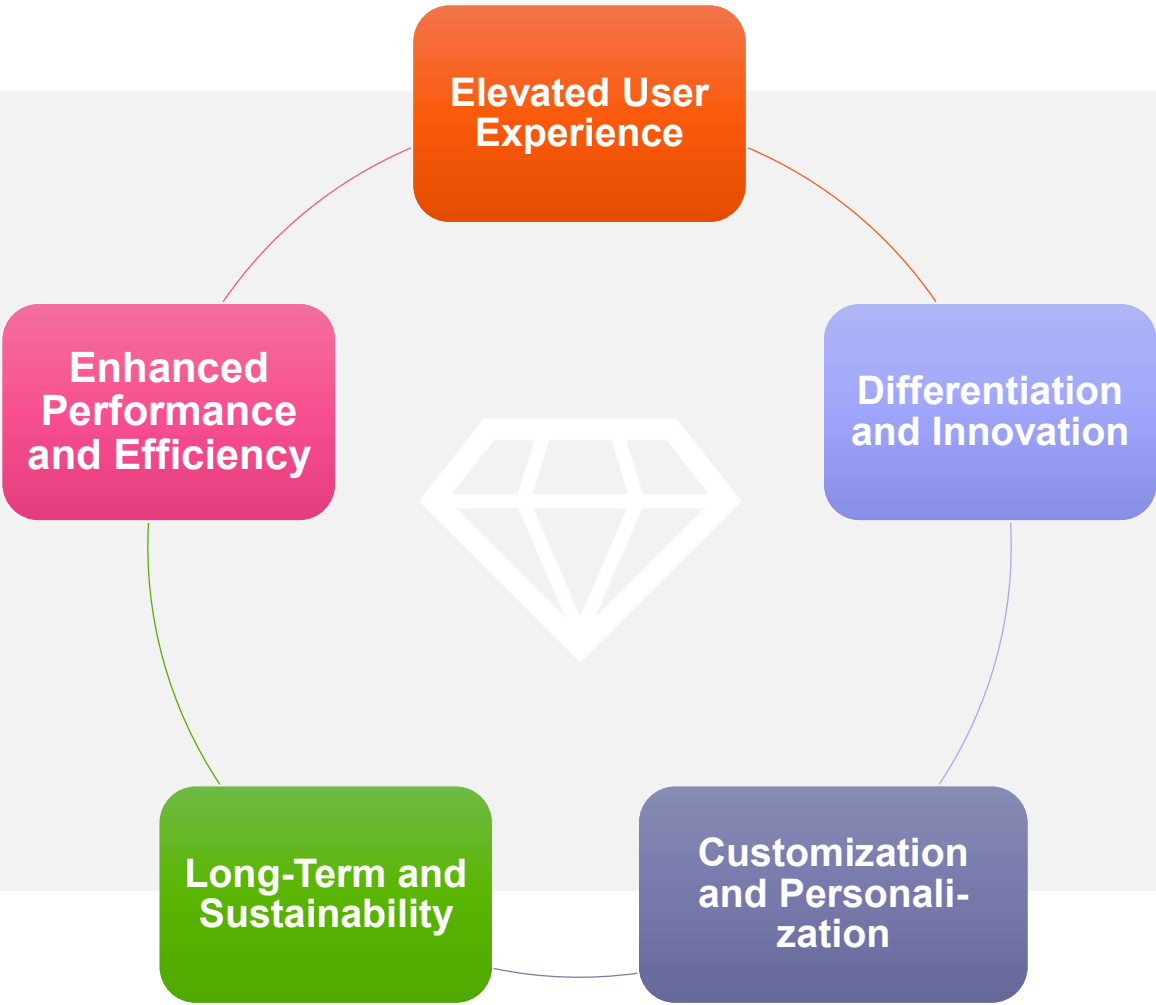
Diverse dynamics is also visible in price bands across sectors

While premium resurface in telecom, it is declining slower than others for IT/OE and SDA and declining significantly for MDA

Global, YTD December 2023 / Key Technical Consumer Goods product groups*

	Total		Telecom	CE + Photo	IT + OE	MDA	SDA

Sales USD Share in %

Total: 29%, 24%, 47%
Telecom: 33%, 28%, 38%
CE + Photo: 30%, 27%, 43%
IT + OE: 16%, 12%, 72%
MDA: 15%, 16%, 69%
SDA: 34%, 21%, 46%

Premium: Brands with price index of >150**

Standard: Brands with price index of 75<=150**

Entry: Brands with price index of <=75**

Sales USD Value Growth % YoY

Total: -1%, 0%, -9%
Telecom: 6%, 1%, -10%
CE + Photo: 1%, 0%, -10%
IT + OE: -7%, -12%, -3%
MDA: 2%, -2%, -9%
SDA: 1%, 0%, -7%

Select premium feature sales increased/declined slower than the category average
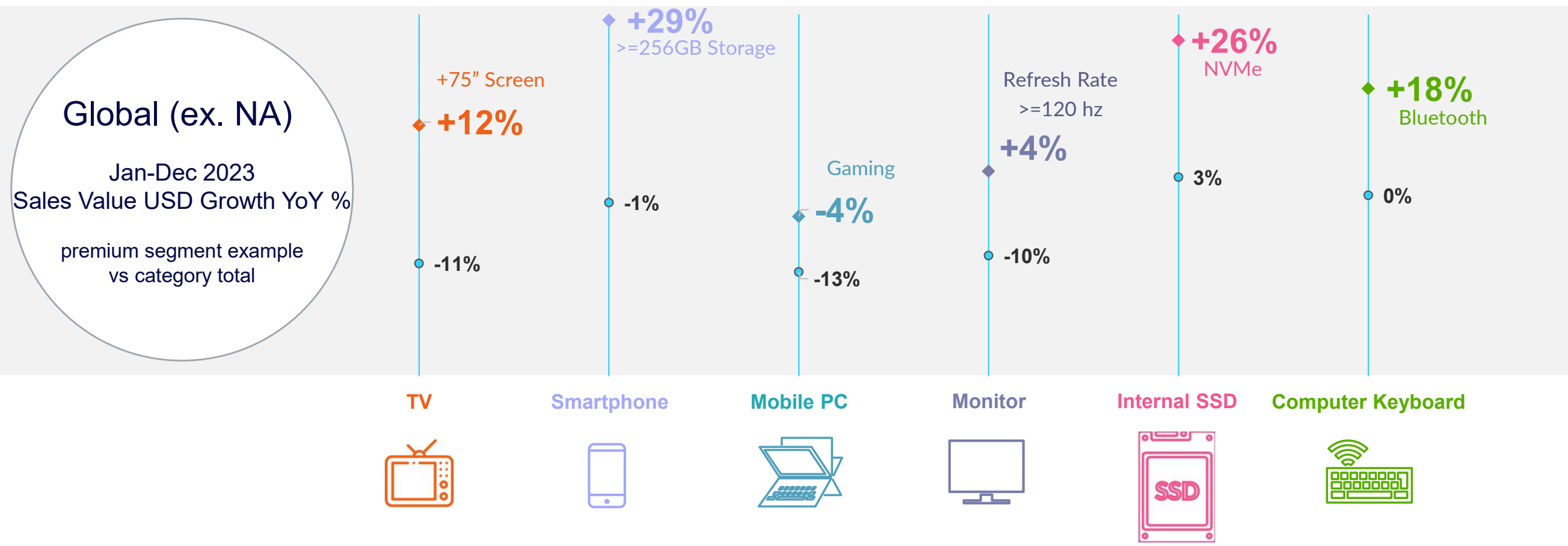
Global (ex. NA)

Jan-Dec 2023
Sales Value USD Growth YoY %

premium segment example
vs category total

TV

+75" Screen
+12%

-11%

Smartphone

+29%
>=256GB Storage

-1%

Mobile PC

Gaming
-4%

-13%

Monitor

Refresh Rate
>=120 hz
+4%

-10%

Internal SSD

+26%
NVMe

3%

Computer Keyboard

+18%
Bluetooth

0%

Maintaining Relevance:

The Continuing Importance of Managed Services

Maximizing Value: The Challenge of Charging for Consulting Services

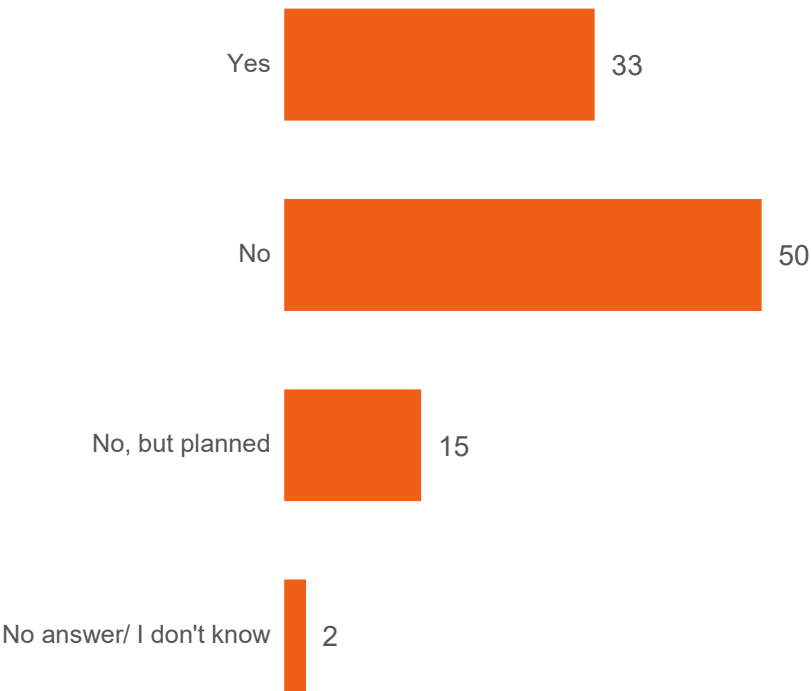Only 21% of respondents can charge for the consulting effort in full
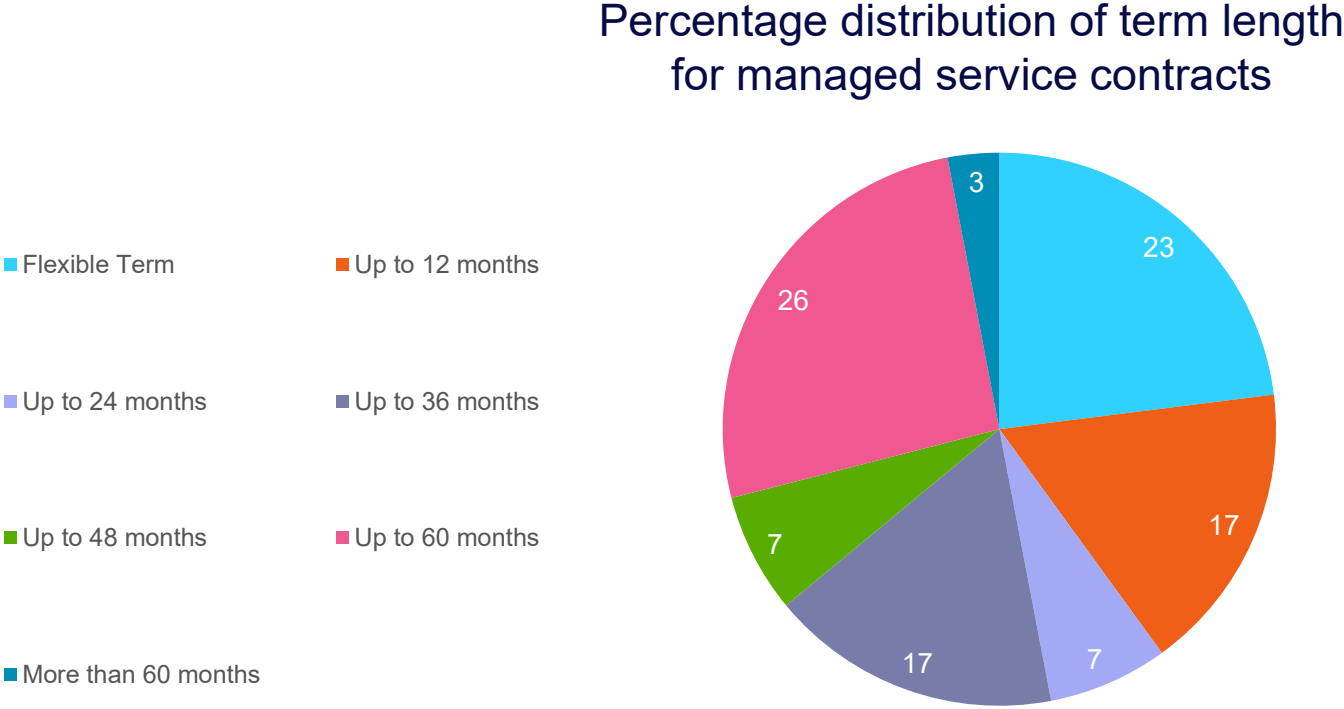
Type of Consultation

Legend:
- Just Consulting
- Consulting incl. Execution
- Andere

Pie chart values: 83, 11, 6
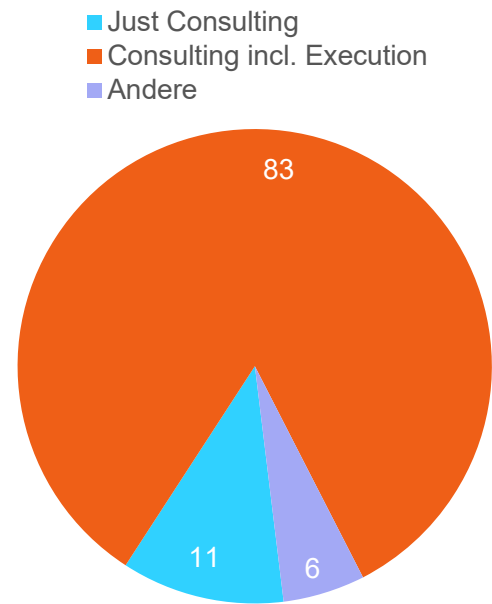
Charge for the entire consulting effort?

Legend:
- Yes, completely
- Yes, partially
- No

Pie chart values: 66, 21, 13
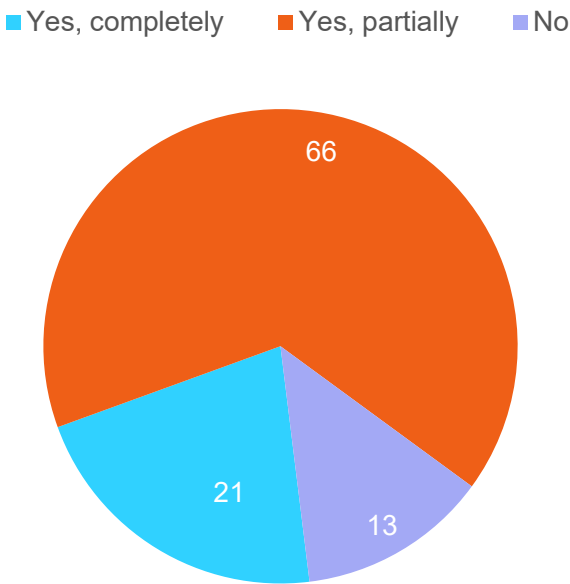
Offer of funding consultation?

Yes	33
No	50
No, but planned	15
No answer/ I don't know	2

Flexibility in Managed Service Contracts

Nearly 30% of contracts feature >= 60-month terms

Percentage distribution of term length for managed service contracts

Legend:
- Flexible Term
- Up to 12 months
- Up to 24 months
- Up to 36 months
- Up to 48 months
- Up to 60 months
- More than 60 months

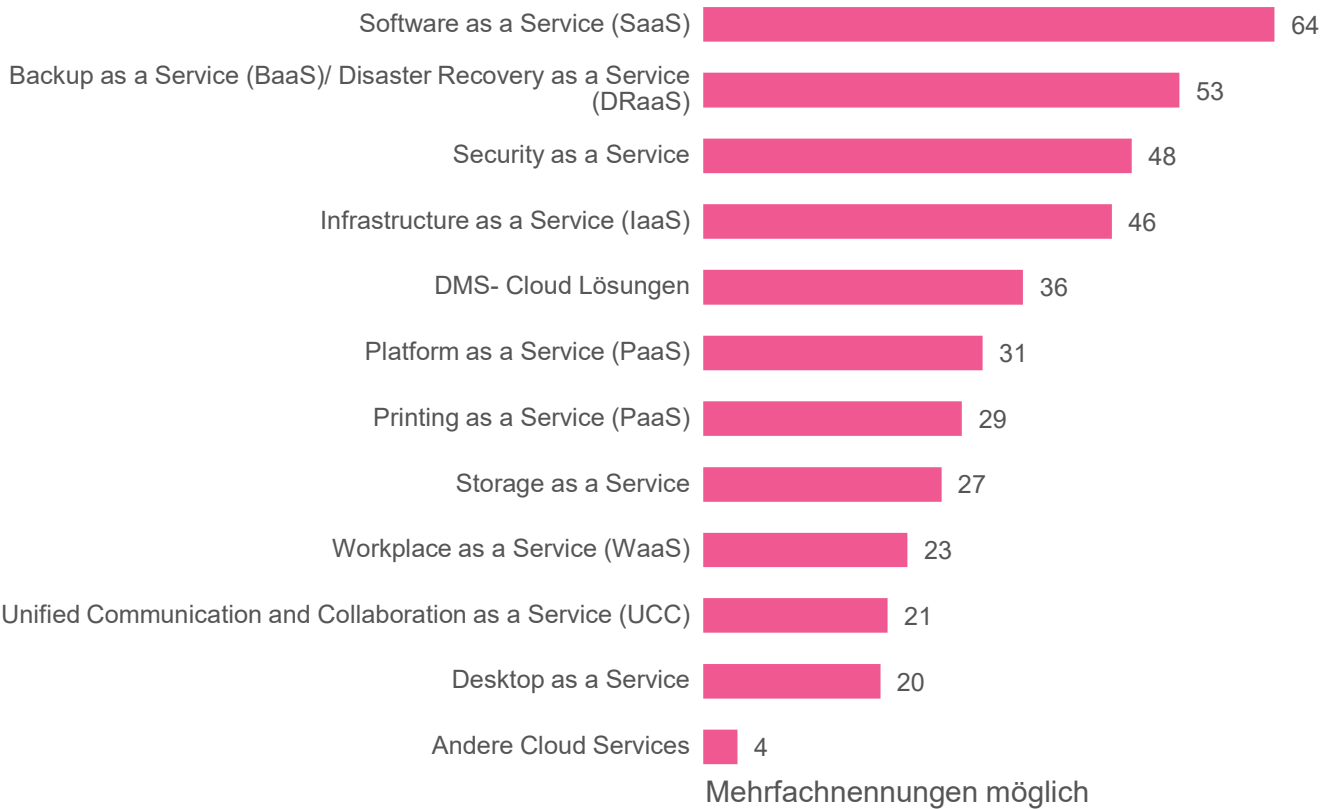Pie chart values: 23, 17, 7, 17, 7, 26, 3

Cloud Dominance: The Rise of SaaS and DRaaS Solutions

21% of business solutions reside in the cloud

Share of business solutions

On Premise ■ Cloud ■ Hybrid

- On Premise: 56
- Cloud: 21
- Hybrid: 23

Offered Cloud- Solutions

Solution	Value
Software as a Service (SaaS)	64
Backup as a Service (BaaS)/ Disaster Recovery as a Service (DRaaS)	53
Security as a Service	48
Infrastructure as a Service (IaaS)	46
DMS- Cloud Lösungen	36
Platform as a Service (PaaS)	31
Printing as a Service (PaaS)	29
Storage as a Service	27
Workplace as a Service (WaaS)	23
Unified Communication and Collaboration as a Service (UCC)	21
Desktop as a Service	20
Andere Cloud Services	4

Mehrfachnennungen möglich

Basis: Befragte, die IT/TK-Lösungen, MPS und/oder DMS/ECM anbieten | Ergebnisse in % | Wie viel % Ihres Lösungs-/Projektgeschäfts findet On Premise bzw. in der Cloud statt? n=157 | Welche der folgenden Cloud-Lösungen bieten Sie an? n=132
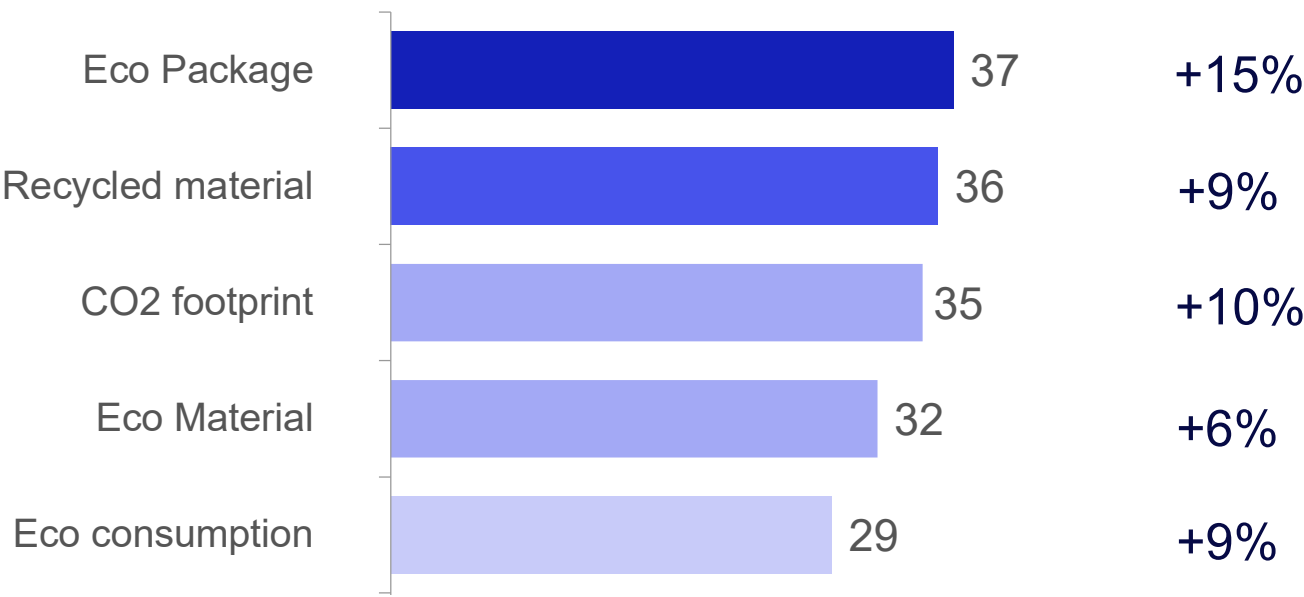
Sustainability

A Continuing Imperative in Shaping Our Future

Significant Growth for all Eco Claims

Carbon-neutral transportation ranks 3rd place – distributors can actively contribute

Sales share of Eco claims | Sales Units % | Jan-Mar 2024

Claim	Value	Growth
Eco Package	37	+15%
Recycled material	36	+9%
CO2 footprint	35	+10%
Eco Material	32	+6%
Eco consumption	29	+9%

GfK Market Intelligence: Sales Tracking, *Smart-Mobilephones-Phablets, EU5: DE, FR, GB, IT, ES March 2024
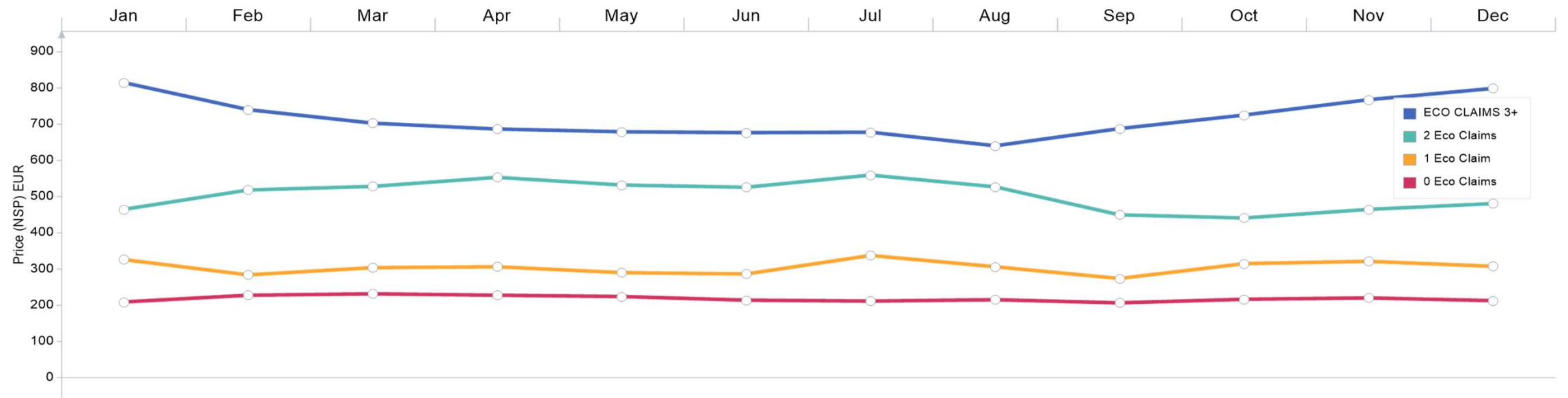
Products with multiple eco-claims achieve higher price points

Eco-claims support premium price ranges

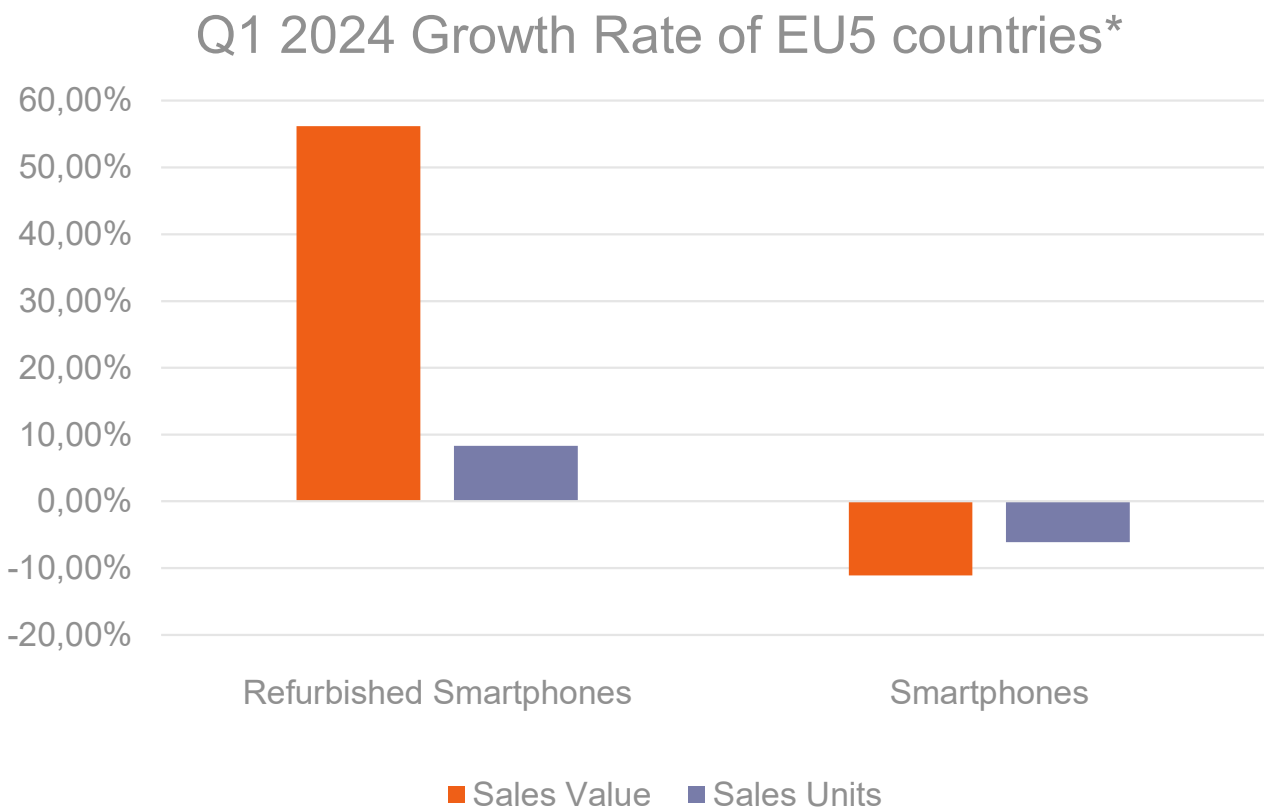| Smart+Mob PH+Phab.	5 CTR WE (DE,ES,FR,GB,IT) Distributors Feature Development	W13:24 Price (NSP) EUR

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ECO CLAIMS 3+	814	739	702	686	679	676	677	640	687	724	767	799
2 Eco Claims	464	518	528	553	531	525	559	526	450	441	464	481
1 Eco Claim	326	284	303	306	290	286	337	306	273	314	321	307
0 Eco Claims	209	227	231	227	223	213	212	215	206	216	220	212

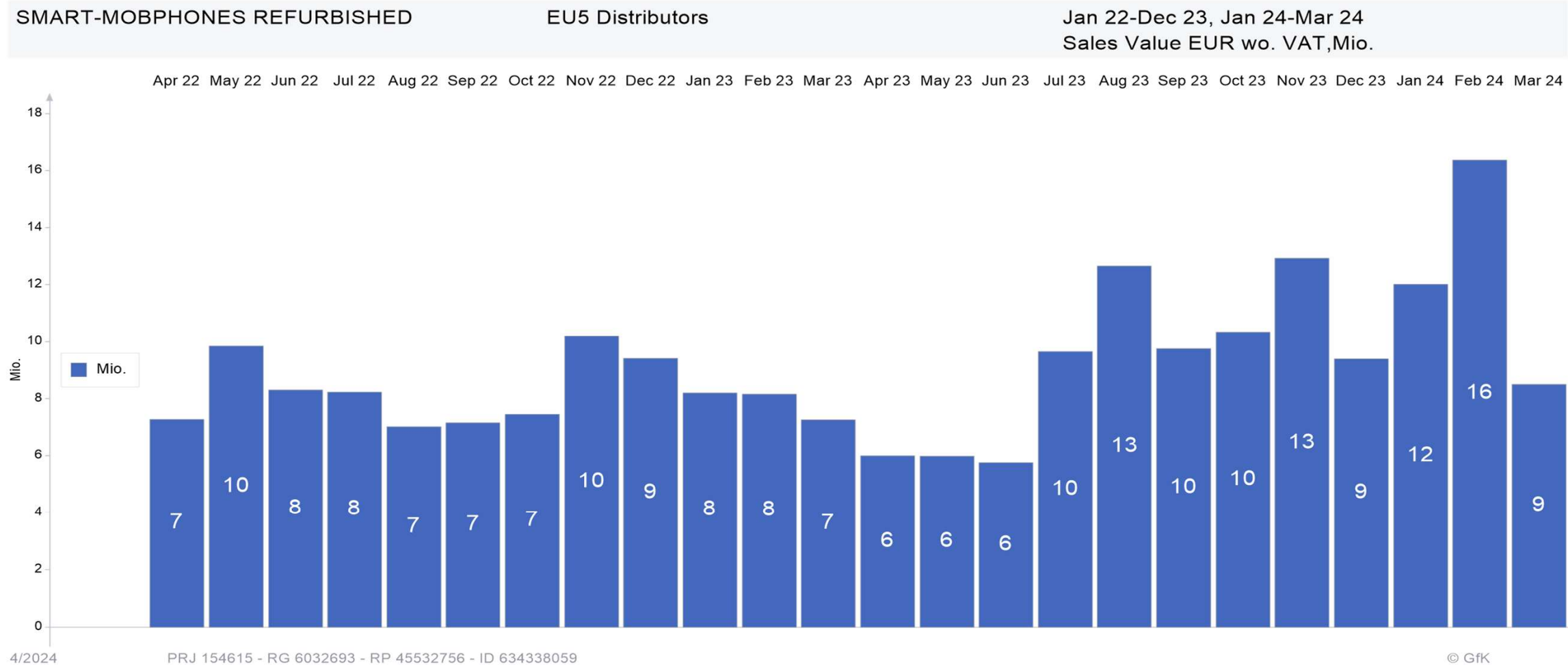# Refurbished Smartphone Market Surges in Q1 2024, Despite Still Modest Share

Q1 Data Reveals Remarkable Growth in EU 5 Refurbished Sales Amidst Declining Performance of New Smartphone Market

Q1 2024 Growth Rate of EU5 countries*

Legend: ■ Sales Value ■ Sales Units

Categories: Refurbished Smartphones, Smartphones

Y-axis: -20,00% to 60,00%

*EU5 countries are based on DE, FR, UK, IT, ES

Enhanced Profit Potential with Refurbished Smartphones in 2024

Increased Revenue Opportunities in the European Refurbished Smartphone Market

SMART-MOBPHONES REFURBISHED · EU5 Distributors · Jan 22-Dec 23, Jan 24-Mar 24 · Sales Value EUR wo. VAT, Mio.

Channel Summit | GfK VIP Luncheon | Charting the Course: Navigating 2024's Distribution Trends | Dominik Friedel & Kelsy McKinley

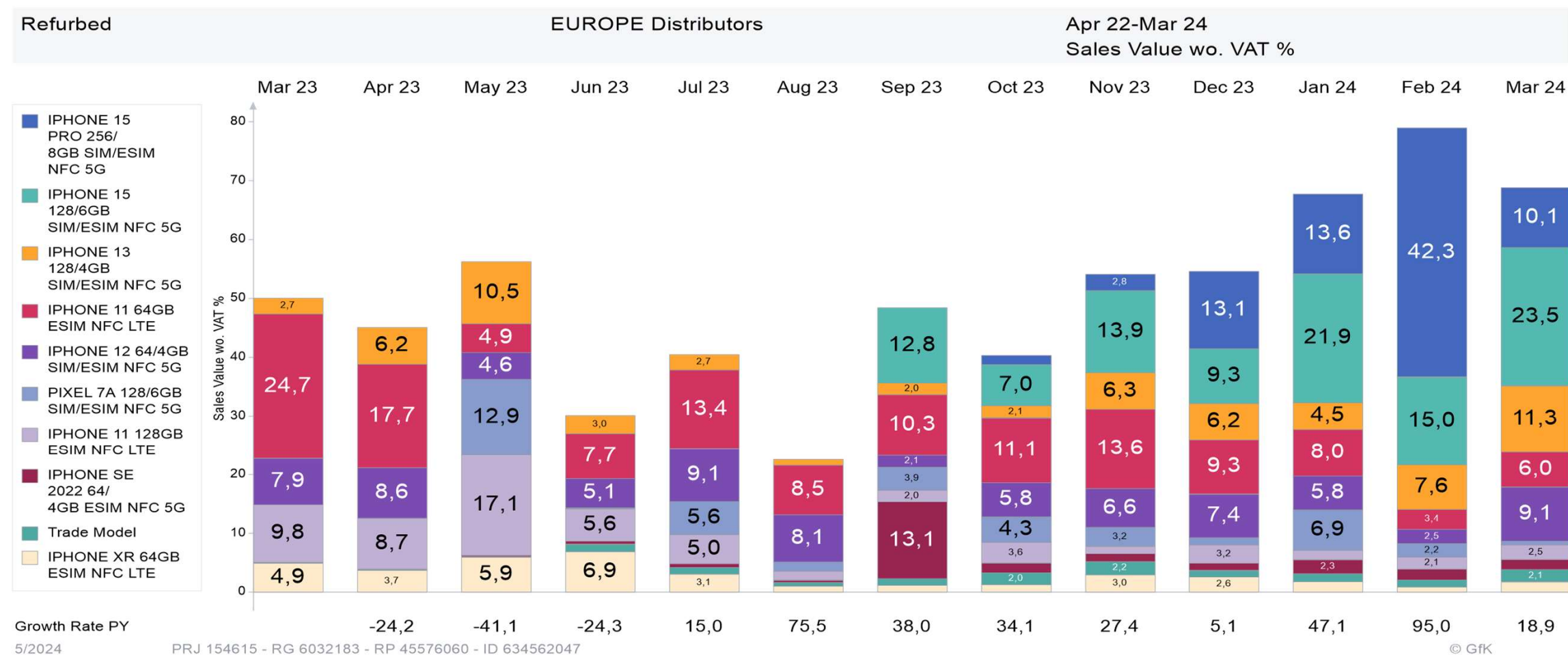© 2024 Nielsen Consumer LLC. All Rights Reserved.

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Refurbished Products Propel Profit Margins through Retail Channels
Selling Refurbished Products to B2C Channels Yields Highest Revenue for Distributors

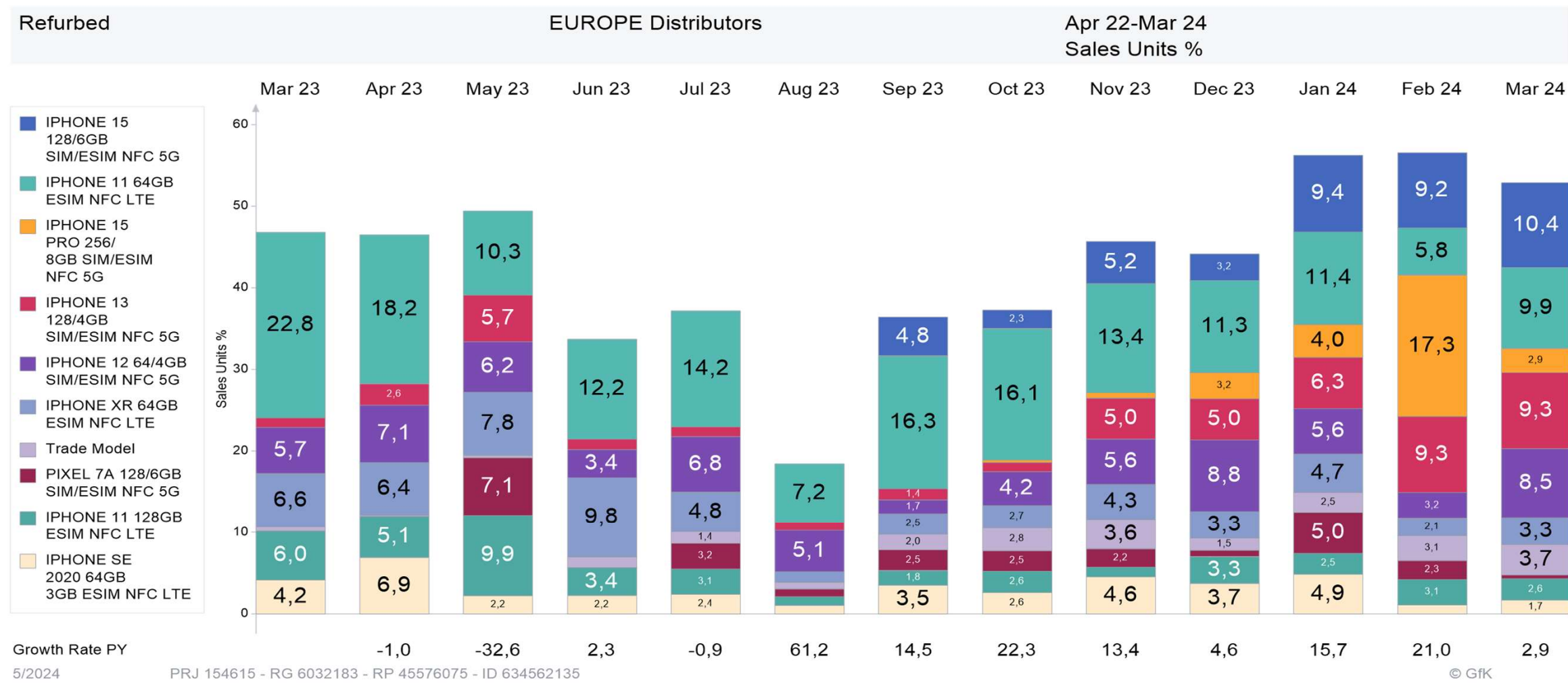| Refurbed						EUROPE Distributors					Apr 22-Mar 24 Sales Value wo. VAT %		
	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24
DIS-B2C	79,3	90,3	75,7	87,2	86,3	89,8	82,6	86,6	79,0	67,5	59,0	39,6	68,8
DIS-B2B	20,7	9,7	24,3	12,8	13,5	10,1	16,9	13,4	20,5	32,4	40,8	60,4	30,5
Growth Rate PY		-24,2	-41,1	-24,3	15,0	75,5	38,0	34,1	27,4	5,1	47,1	95,0	18,9
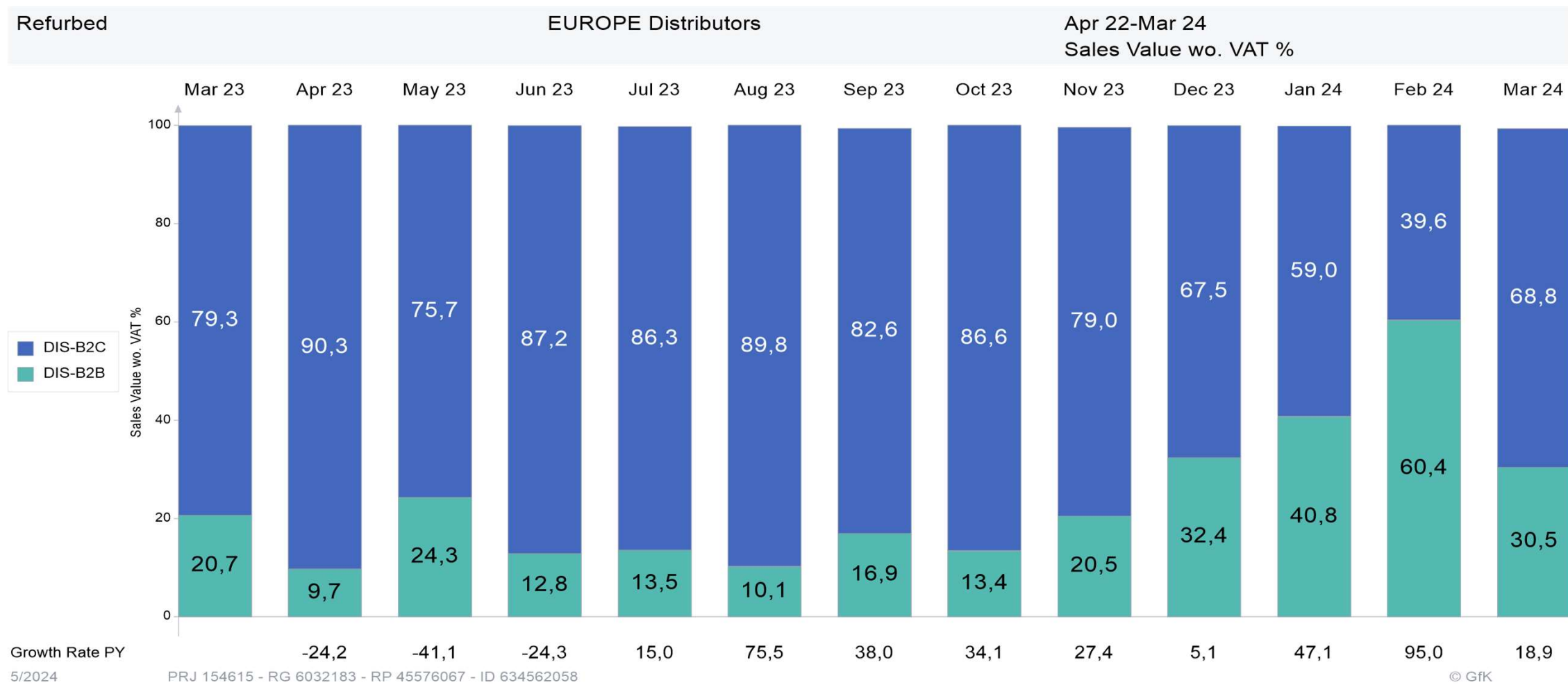
iPhone 15 Models Drive European Distribution Markets in 2024

Latest Apple Devices Lead the Refurbished Market in Resale Value, due to higher price points

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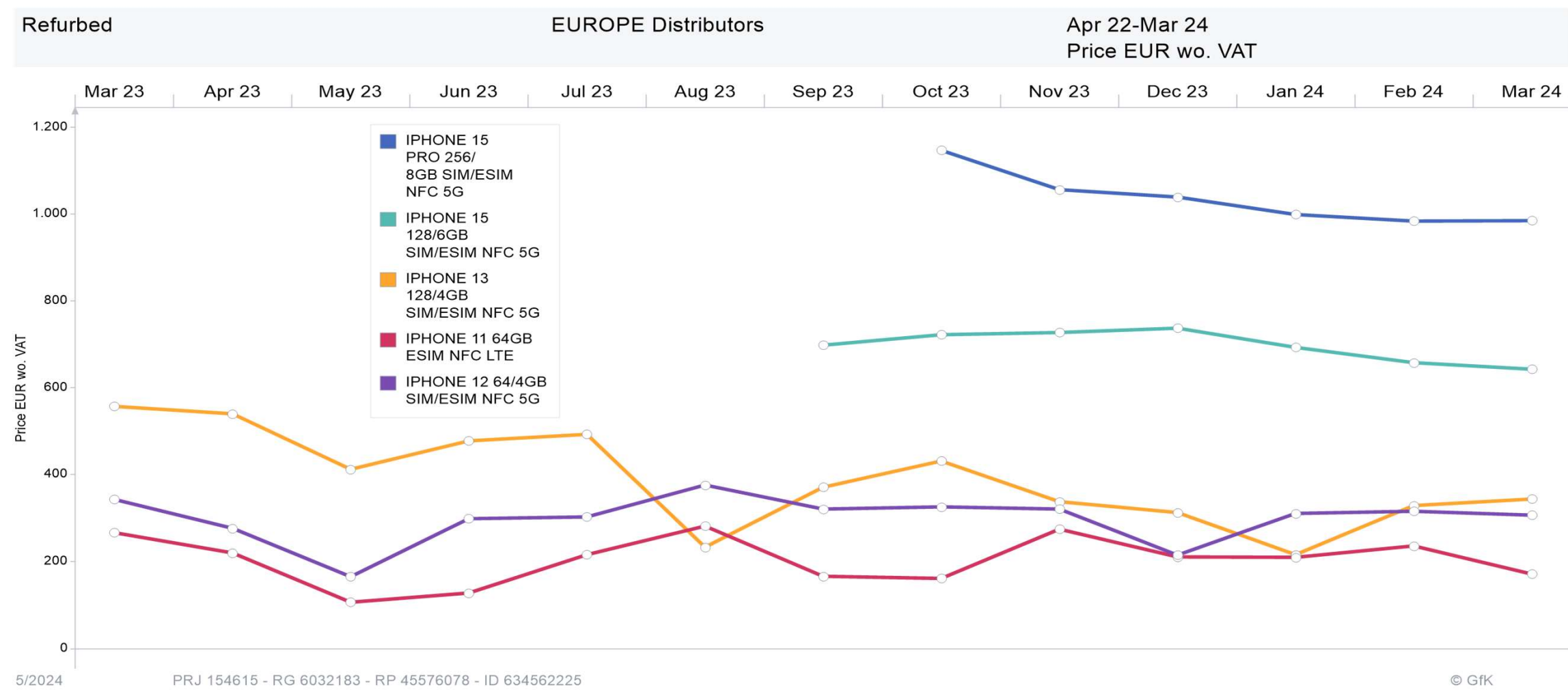© 2024 Nielsen Consumer LLC. All Rights Reserved.

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The Enduring Appeal of iPhone 11: Why It Remains a Consumer Favorite

Affordability, Reliability, and Familiarity Drive Continued Popularity Despite Newer Releases

Refurbed — EUROPE Distributors — Apr 22-Mar 24 Sales Units %

Legend:
- IPHONE 15 128/6GB SIM/ESIM NFC 5G
- IPHONE 11 64GB ESIM NFC LTE
- IPHONE 15 PRO 256/8GB SIM/ESIM NFC 5G
- IPHONE 13 128/4GB SIM/ESIM NFC 5G
- IPHONE 12 64/4GB SIM/ESIM NFC 5G
- IPHONE XR 64GB ESIM NFC LTE
- Trade Model
- PIXEL 7A 128/6GB SIM/ESIM NFC 5G
- IPHONE 11 128GB ESIM NFC LTE
- IPHONE SE 2020 64GB 3GB ESIM NFC LTE

Growth Rate PY	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24
		-1,0	-32,6	2,3	-0,9	61,2	14,5	22,3	13,4	4,6	15,7	21,0	2,9

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Premium Pricing: Refurbished Newest iPhone Models Command Highest Price Range in 2024

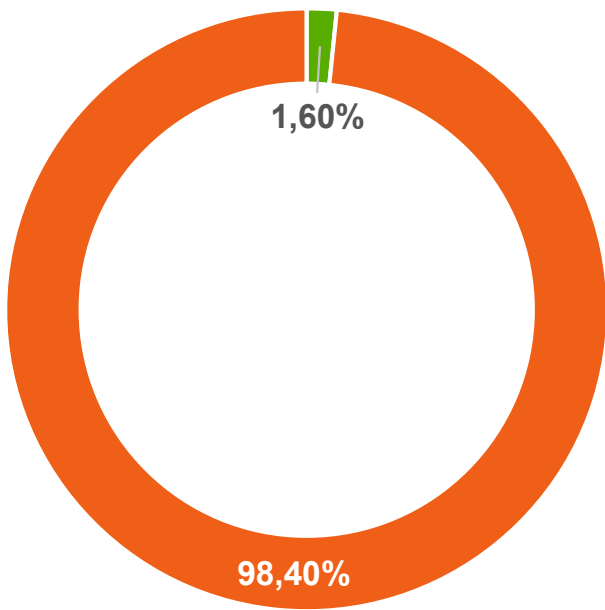Other Models Remain Below 600€ in Europe's Smartphone Market

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Refurbished Smartphones Gain Traction in European Distribution Market

Increasing Demand Reflects Growing Popularity and Relevance Among Consumers
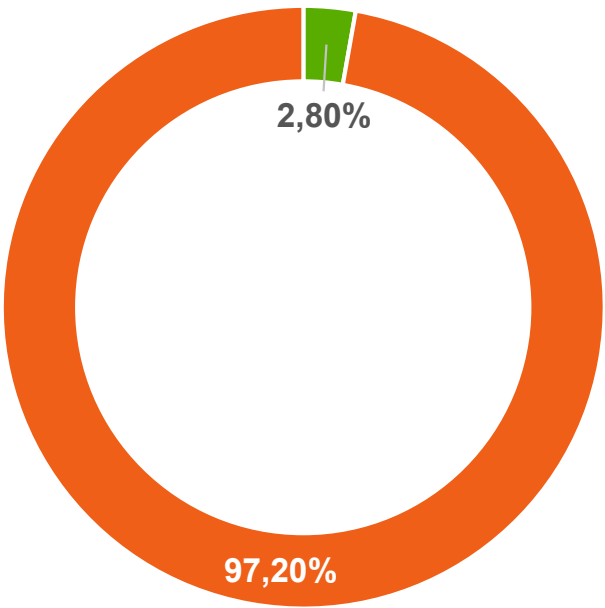
EU5 Distributors

Sales Value wo. VAT

January 2023- March 2023

1,60%

98,40%

■ Refurbished Smartphones　■ Smartphones

January 2024- March 2024

2,80%

97,20%

■ Refurbished Smartphones　■ Smartphones

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Distributor business: What to look for in 2024+?

Emerging Technologies & Premiumization

Managed Services
(esp. Security Services)

Sustainability

Data-driven Insights

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Explore **gfk**newron Distribution
Addressing questions relevant to your business

Understand market dynamics

- What technical feature is driving market growth recently and where should I start to experience the momentum?

Analyzing vendor dynamics

- Are there any newcomer or established brands in the market that I should consider adding to my portfolio?

Spot opportunities

- What are the emerging trends in the distribution market, and how can we align our product portfolio accordingly?
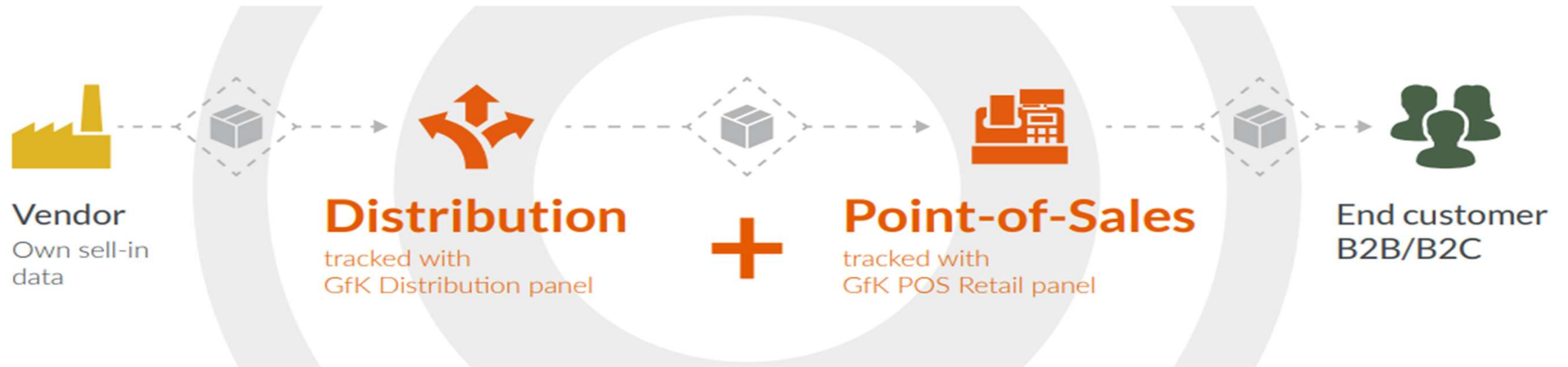
Partnership Principles

Get the Complete Picture!

Meet the perfect match of distribution and point-of-sales market intelligence

The world's leading POS panel & largest Distributor Sales Tracking*

Vendor
Own sell-in data

Distribution
tracked with GfK Distribution panel

+

Point-of-Sales
tracked with GfK POS Retail panel

End customer B2B/B2C

- **What** is selling
- **Where** is it selling
- **When** is it selling
- At **what Price** is it selling

✓ **Benchmark your performance**

✓ **Maximize your sales impact and channel ROI**

✓ **Predict future sales performance**

✓ **Assess inventory and POS gross margins in just one go**

*Tech and Consumer durables based on country coverage and product groups

Our Partnership Model

Gain customized & valuable market insights as part of a global network

Free of Charge

Data Exchange

Benchmarking

Tailored Reporting DIS & POS*

* Depends on Partnership Level

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Join our network!

Benefit from a partnership with GfK and participate within our panel of 300 distribution partners worldwide.