



European Second-Hand Devices Market

Circulaire-IT Conference, 14 November 2023



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Vice President of Research

An aerial night view of a city skyline, likely New York City, with numerous skyscrapers illuminated. Overlaid on the city are many vertical lines of varying colors (blue, purple, red, green) that extend from the ground up into the dark sky. Each line is topped with a small, glowing dot of the same color, creating a digital or data visualization effect. The lines appear to be connected to the city's infrastructure, suggesting a theme of technology, data, or connectivity.

We are CCS Insight



30

YEARS PROVEN TRACK RECORD

CCS Insight has a 30-year proven track record serving the technology industry.



1,500+

PREDICTIONS DELEGATES

Over 1,500 delegates registered for our 2021 Predictions event, making it our most influential to date.



10

OF THE TOP-10 FORTUNE 500

We serve all of the top-10 Fortune 500 technology companies, helping them with critical decision-making.



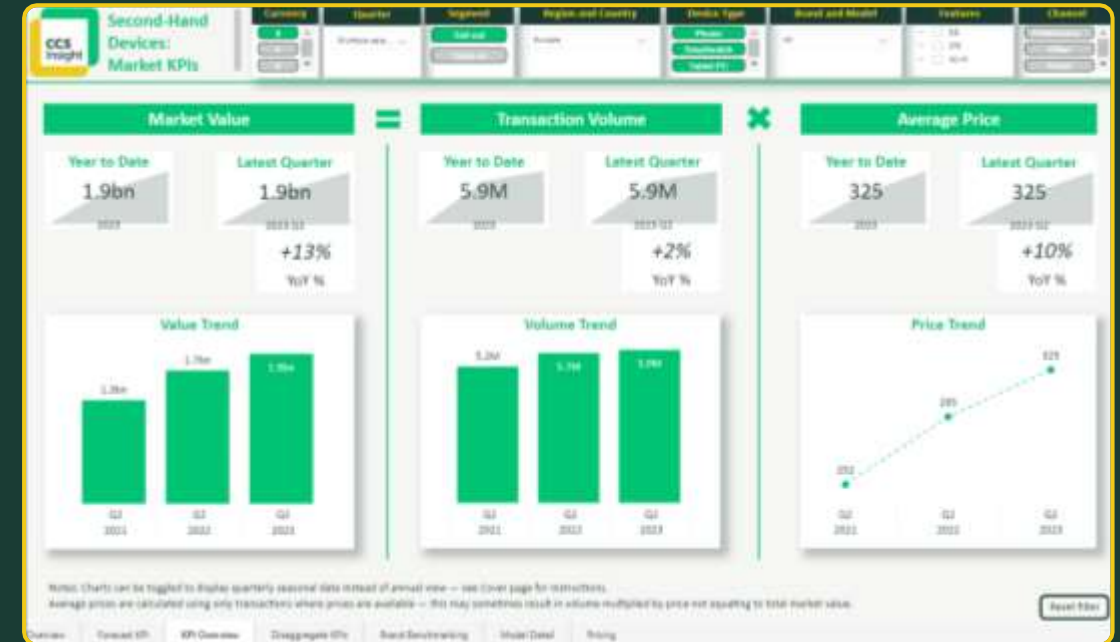
#1

FOR INFLUENCE GROWTH

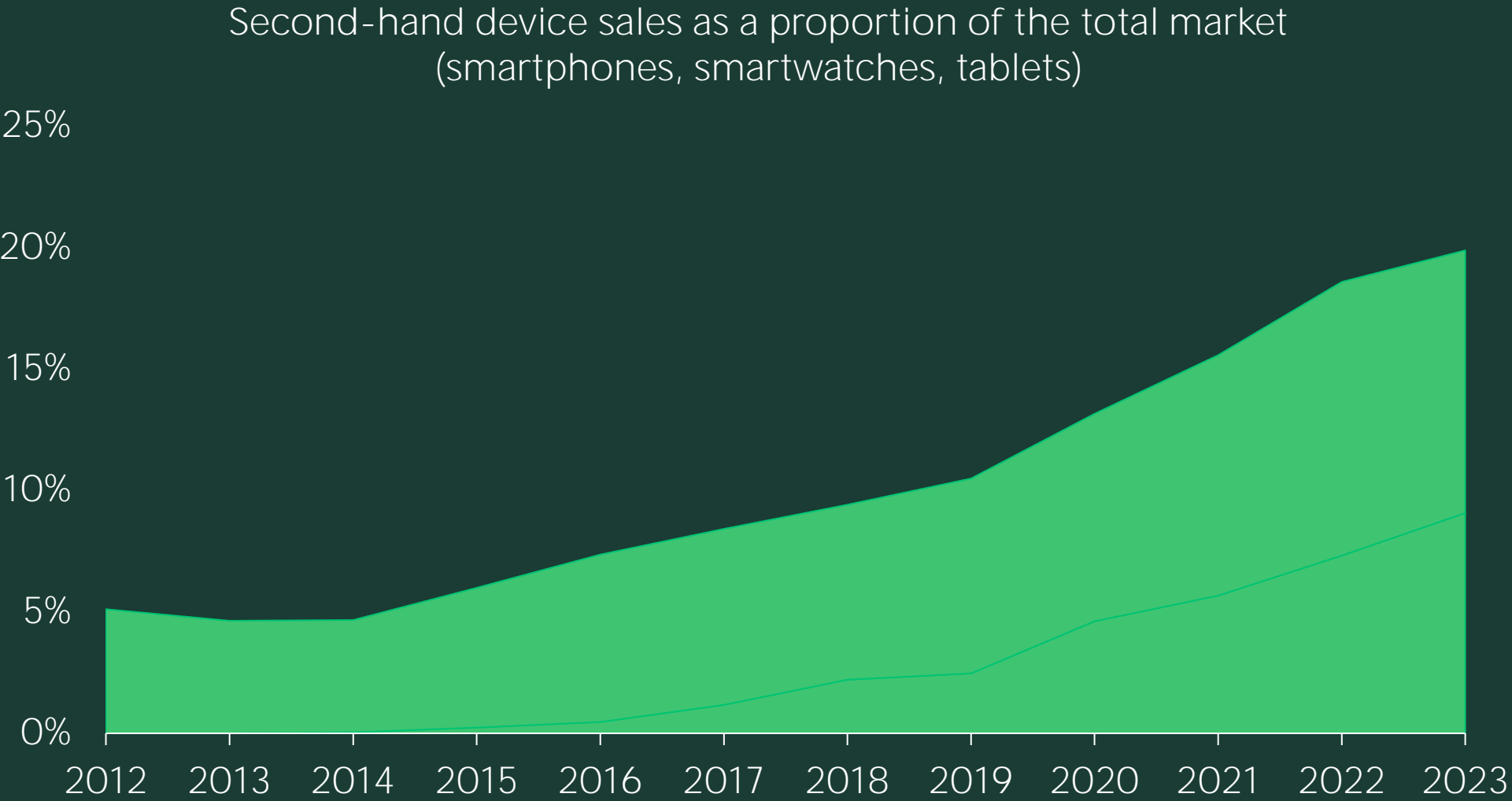
CCS Insight was named first for analyst influence growth in the University of Edinburgh's 2020 Analyst Value Survey.

Circular Economy Research at CCS Insight

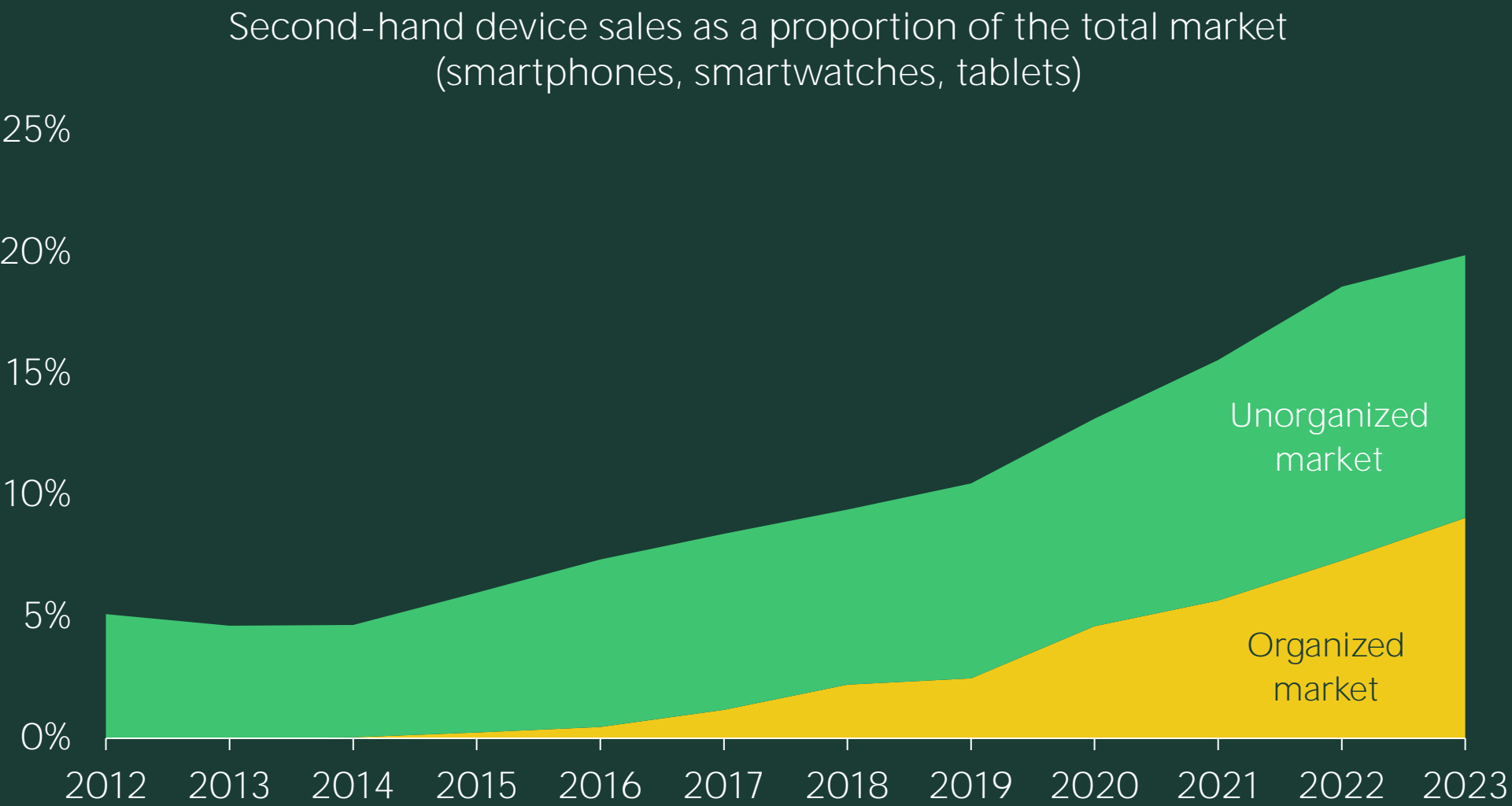
- We cover the circular economy in four core products
- Pulse: quarterly tracking
 - Interim reports delivered five weeks after quarter-end
 - Full granularity delivered eight weeks after quarter-end
 - Delivered in Power BI-based dashboards
- Spotlight: bi-annual market report
 - Forecasts, channel and supply chain visibility
 - Published in February and October
- Mobile Phone Buying Survey
 - Annual survey of UK consumers
- Connected Consumer Radar
 - Six markets updated six times annually
- Custom research and consulting



One in Five Mobile Devices Sold in 2022 Was Pre-Owned



The Organized Secondary Market Is Driving Growth in Shipments



Emergence of the Organized Secondary Market

2014

Retail offerings emerge

Refurbishing largely
in Asia

2018

US carriers export
surplus iPhones
globally

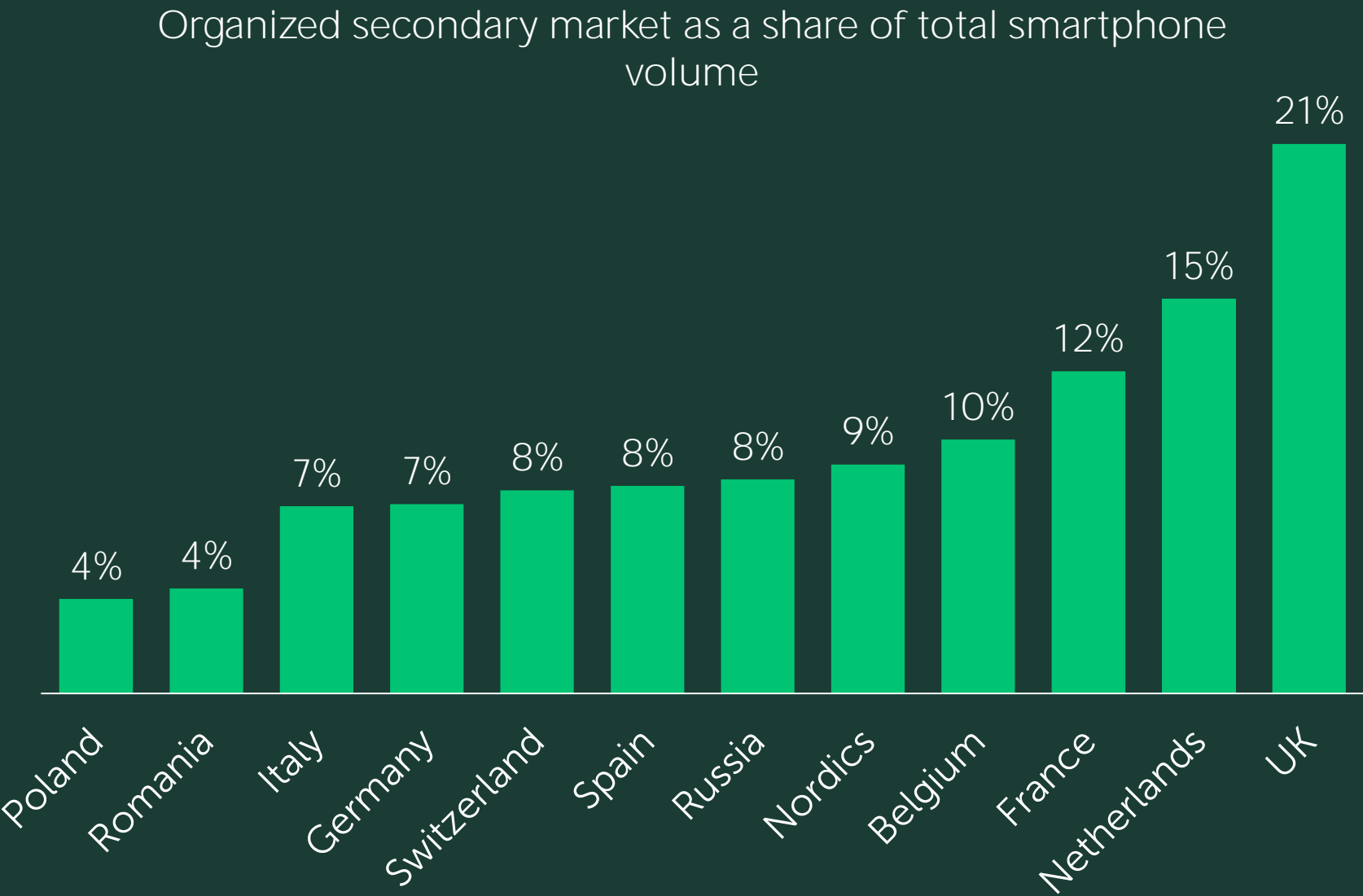
Regional refurbishing
emerges

2023

About 70 large retailers
buying and selling

Automated and
integrated refurbishing
emerges

European Second-Hand Market Has Not Yet Reached Maturity



Saving Money Is the Top Factor Igniting Interest in Second-Hand

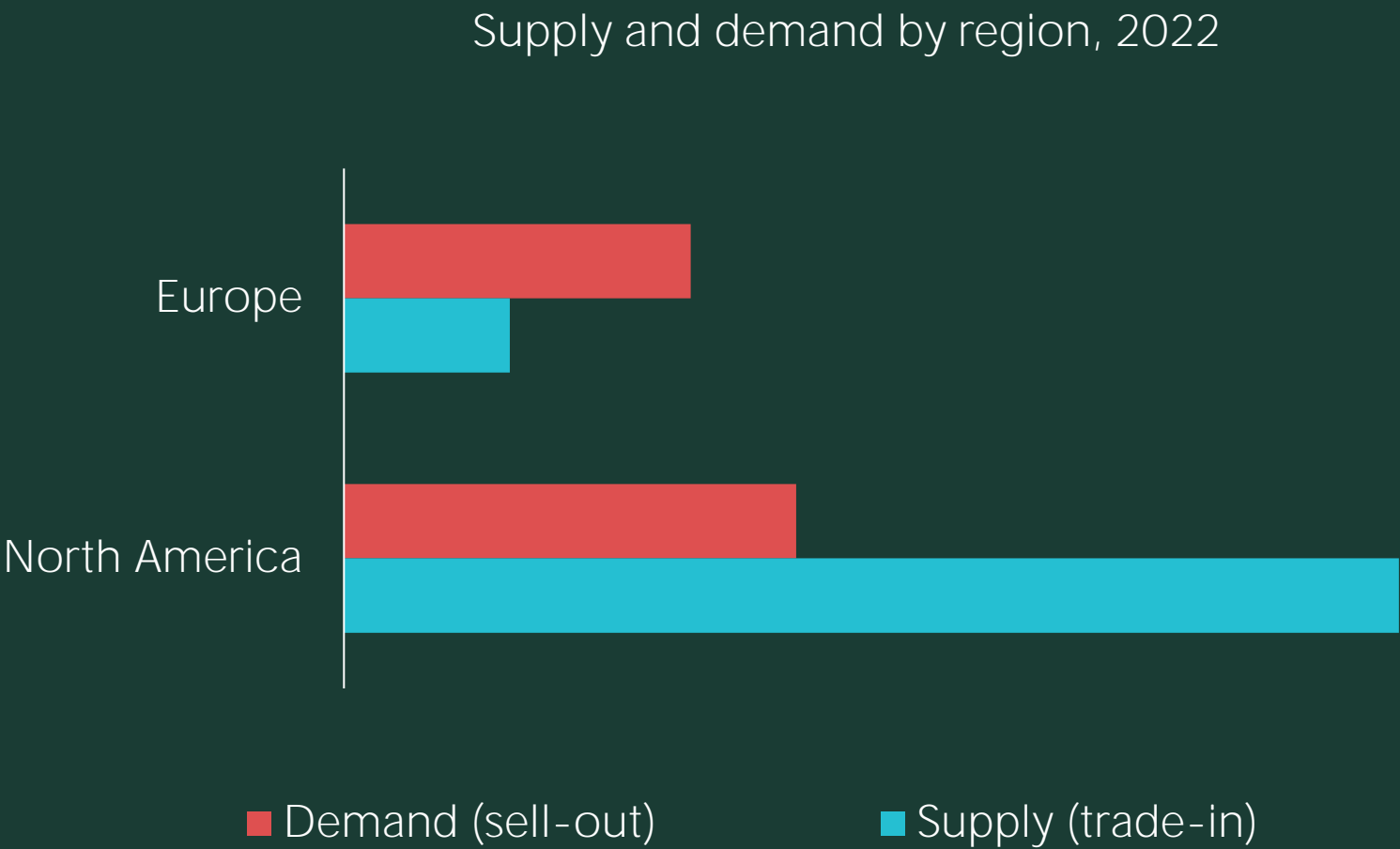
Top reasons to buy a second-hand mobile phone device



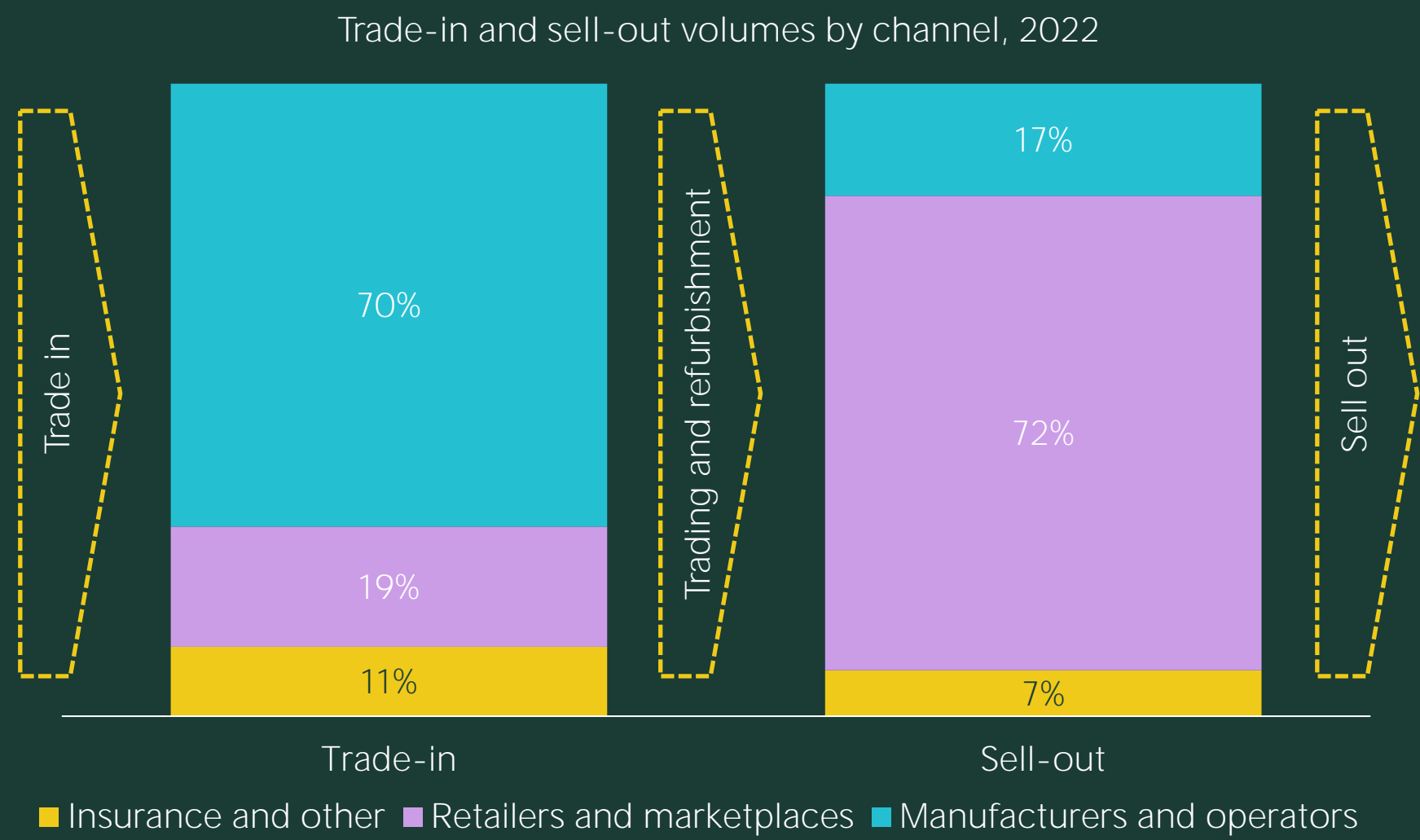
Source: CCS Insight User Survey: Mobile Phone Buying, 2022



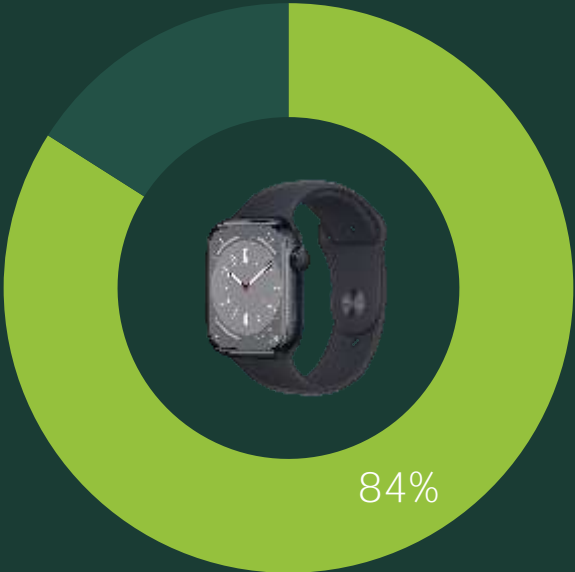
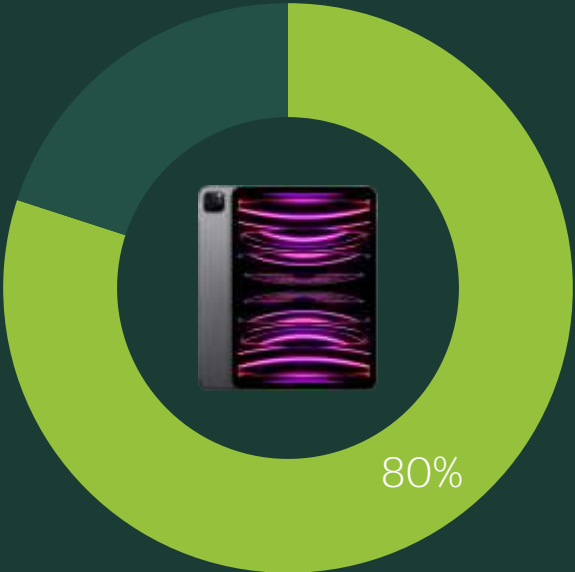
European Supply Deficit; North American Supply Surplus



Trade-In and Sell-Out Channel Flows Are Well Established



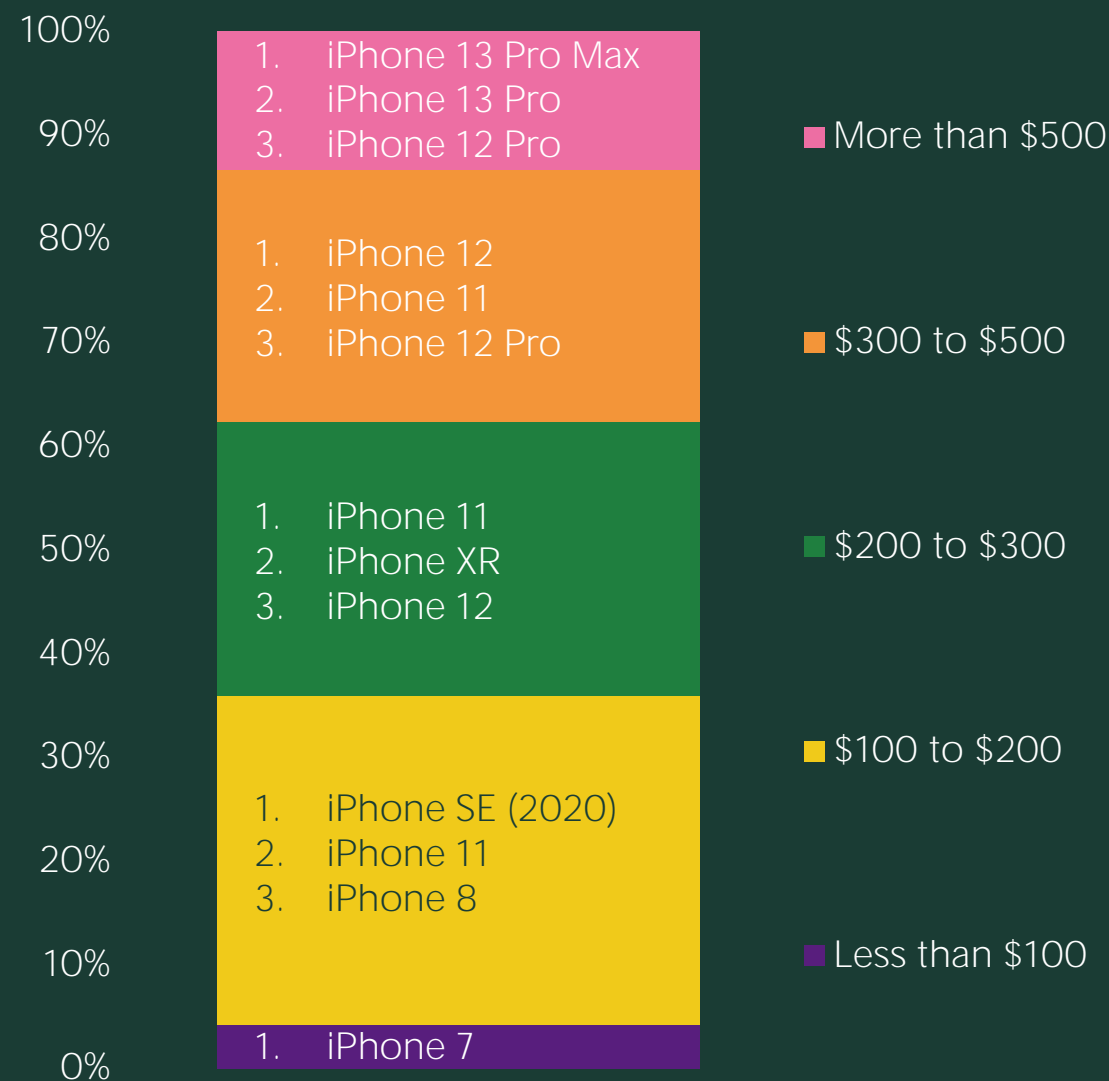
Apple Dominates in All Organized Segments of Pre-Owned Devices



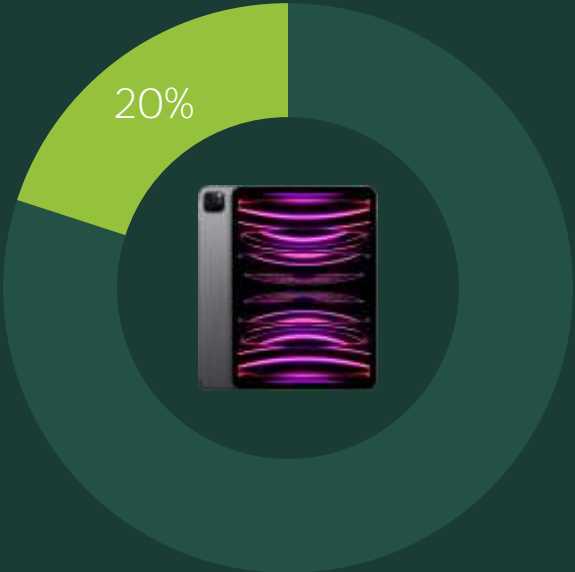
■ Apple ■ Other

iPhones Are Competing in More Price Tiers, Thanks to the Secondary Market

Device sales in 2Q23 and top-selling models, by price tier

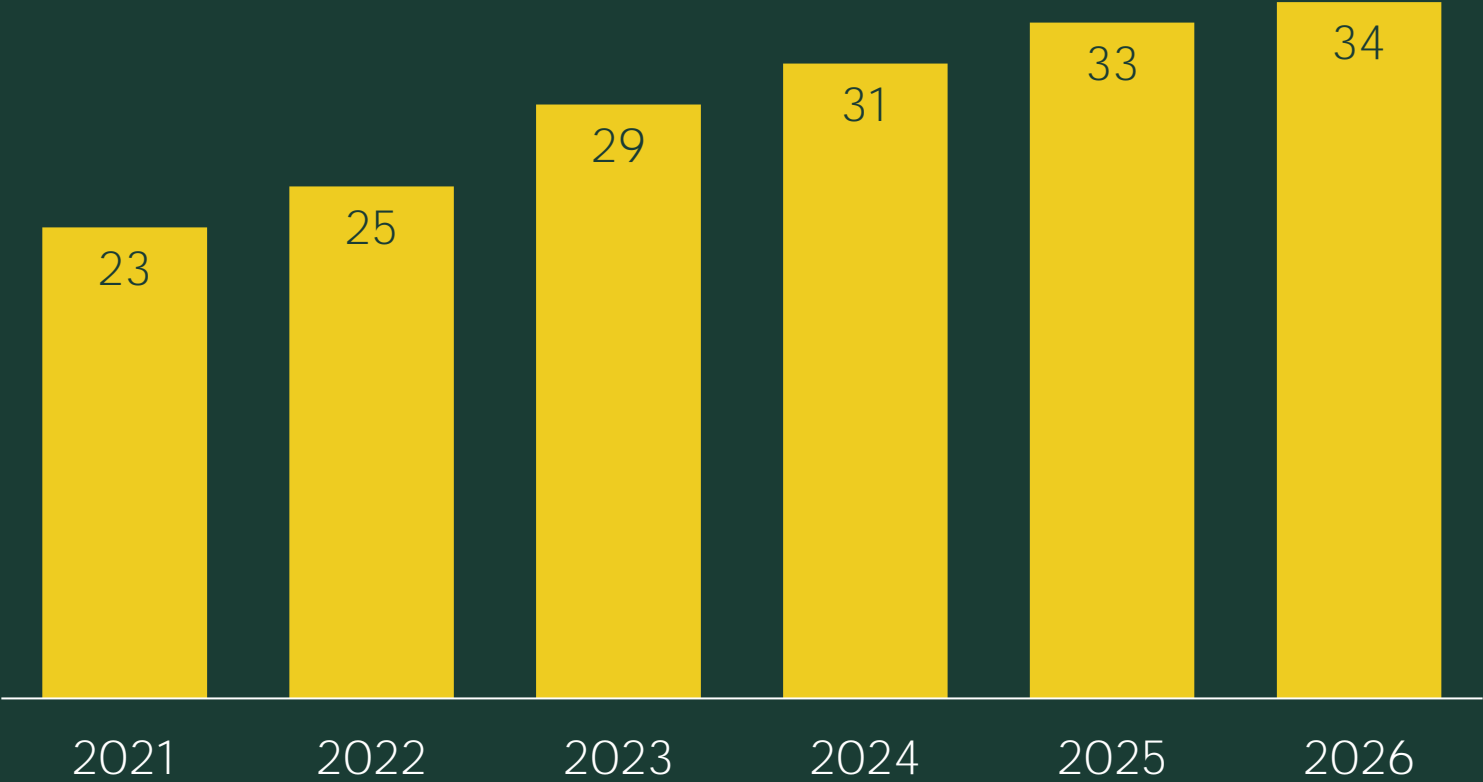


Two Out of Five iPhones Sold in 2022 Were Second-Hand



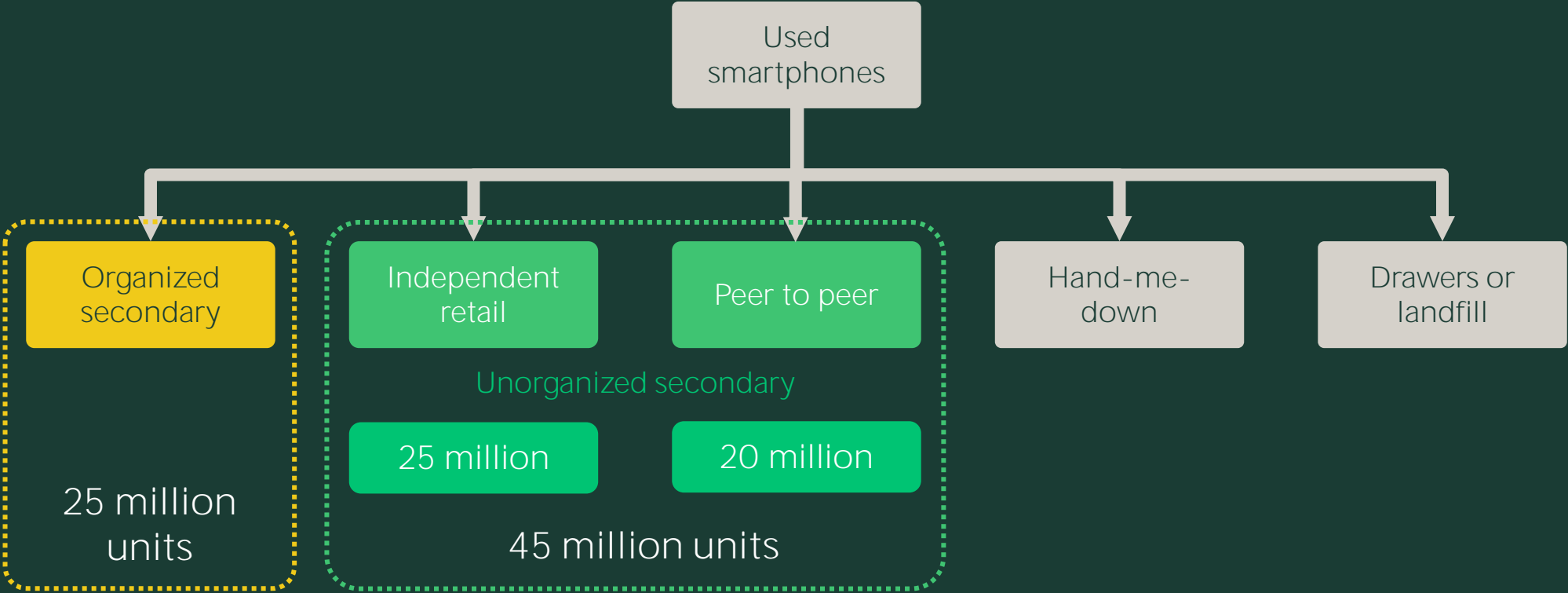
■ Secondary ■ Primary

Organized second-hand device sales, Europe (millions)




Source: CCS Insight Pulse Dashboard: Second-Hand Devices

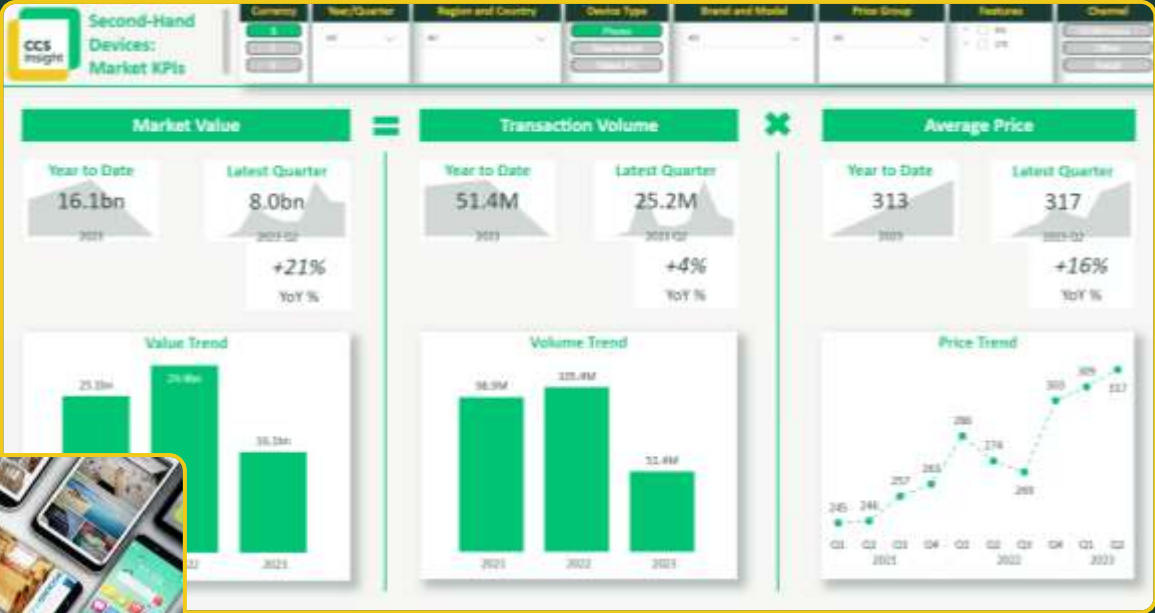
The Circular Economy in Europe





Pulse Report
Second-Hand Devices, Worldwide
2Q23







Spotlight:
Second-Hand Smartphone
Market, Worldwide



Thank you



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