

Sustainability driven growth in Tech & Durables

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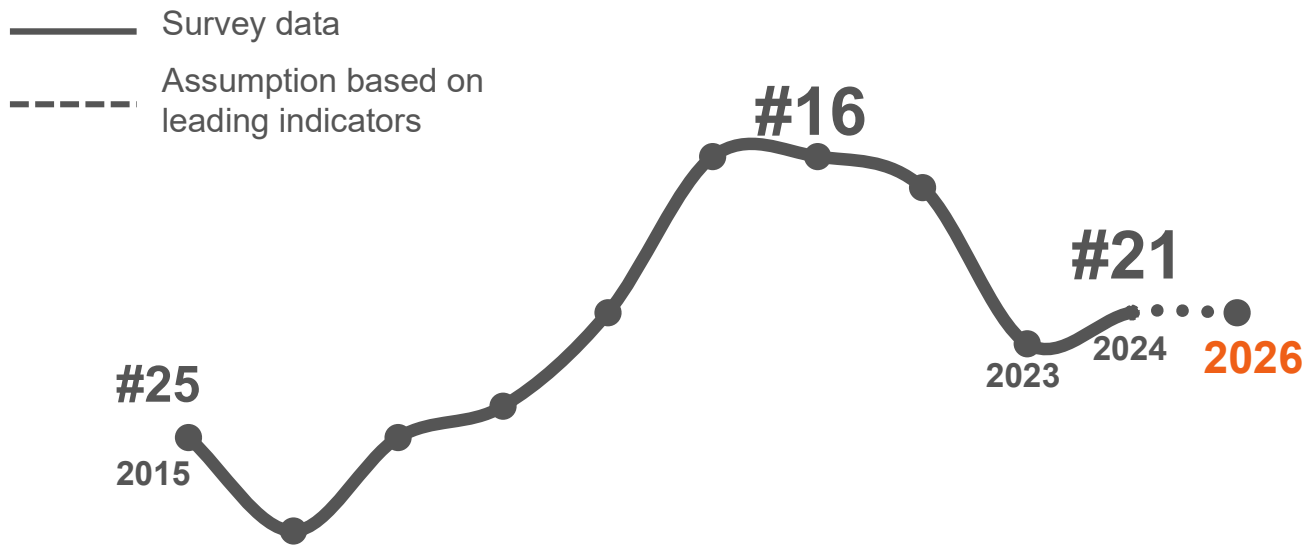
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In 2025, sustainability was expected to remain stable in relevance, as economic sentiment stalled.

Sustainability is not gone – it’s dormant

It is a **growing value** since 2015, but “**economic security first**” has been a priority.



Source: NIQ Consumer Life Global 2024 and previous years, C1 (global = 18 countries), ranks out of 57 personal values
NIQ Consumer Outlook 2024/25, Global
Q: Compared to a year ago, is your household better off or worse off financially



Risks with strongest negative impact

Risks expected to have strongest negative impact



**Economic
Downturn**



**Decline in
demand**



**Margin
pressure**



**Geopolitical
Tensions**

Source: NIQ B2B Market Pulse 2025;
Q: To what extent do you expect the following risks to impact your business in 2025



Current economic challenges & price sensitivity burden investments in sustainability.

50% of respondents globally agree “**First comes economic security and well-being, then we can worry about environmental problems**”

51% of respondents globally agree “**The environmentally friendly alternatives for many of the products I use are too expensive**”

Despite market challenges, businesses are clear on investments

Technology investments are seen as most important in the B2B space to overcome current challenges.

Sustainability is still among top important themes for 2024+.

Most important topics for B2B



Sustainability is still a top expectation towards companies today

“Brands and companies have to be environmentally responsible these days”
(Ranking on list of 41 attitudes towards life)



NIQ Consumer Life Global 2024, GG_3 (global = 18 countries); NIQ Green Gauge Plus 2022, SS19 (global = 10 countries)



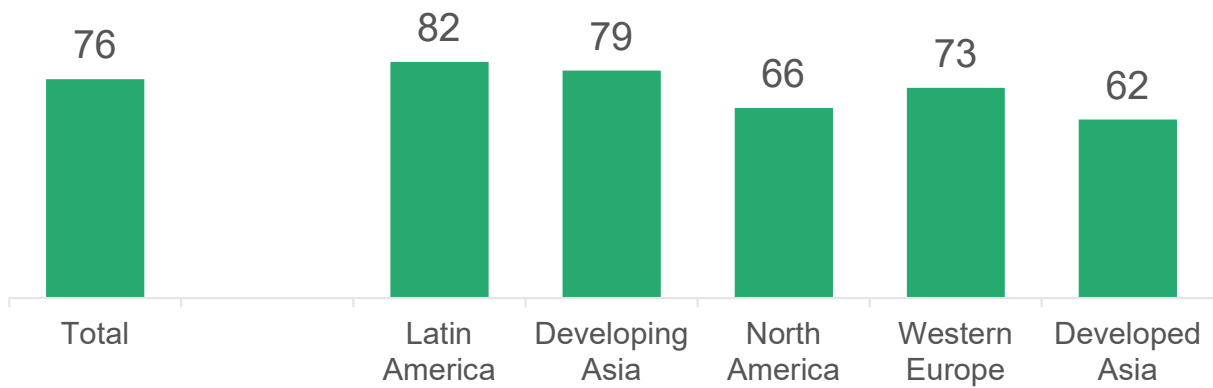
Sustainability is still a top expectation towards companies today

Sustainability is moving from spotlight to operational mode

Most important responsibilities of companies *(Ranking on list of 19 items)*

- #1 Being environmentally responsible
- #2 Producing good quality products or services
- #3 Paying all employees fairly (regardless of gender, ethnicity, etc.)

“It is important that companies take environmentally responsible actions, such as using environmentally friendly materials or ingredients” *(% agree/somewhat agree)*



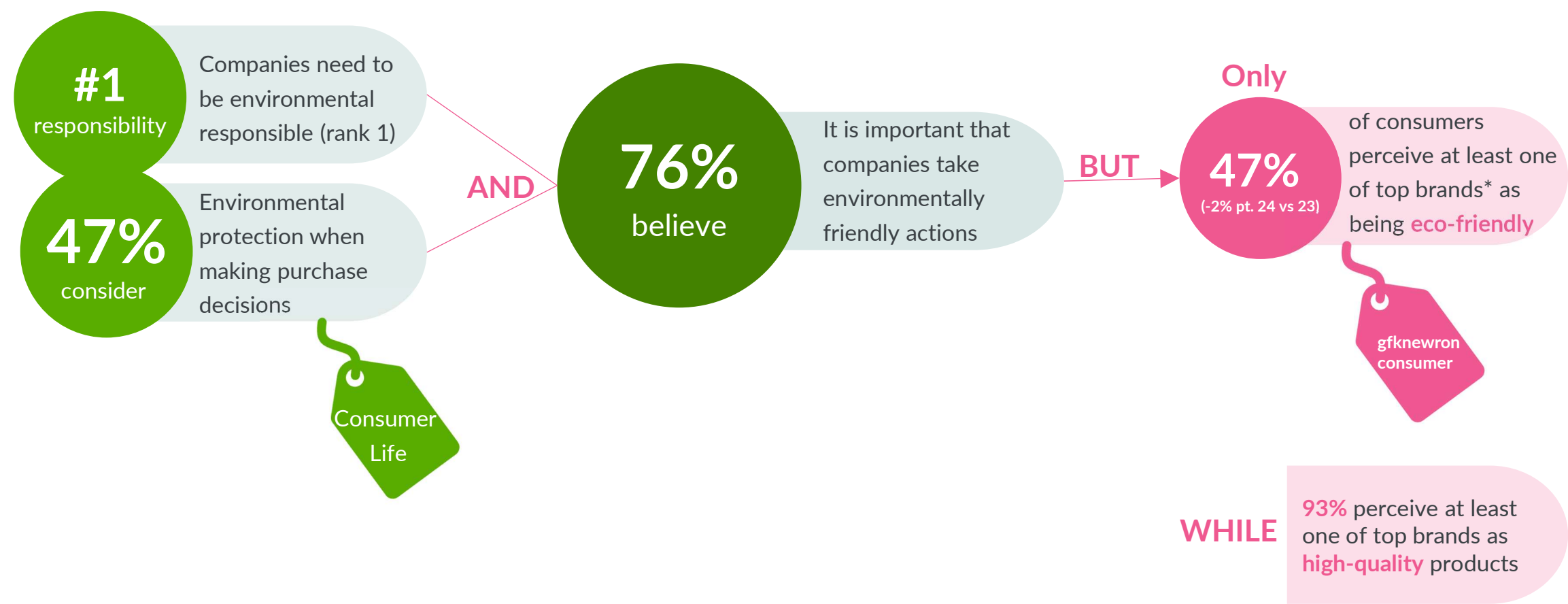
“Brands and companies have to be environmentally responsible these days” *(Ranking on list of 41 attitudes towards life)*



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While companies are expected to drive green transformation, most brands are not recognized as eco-friendly in the T&D industry (yet)

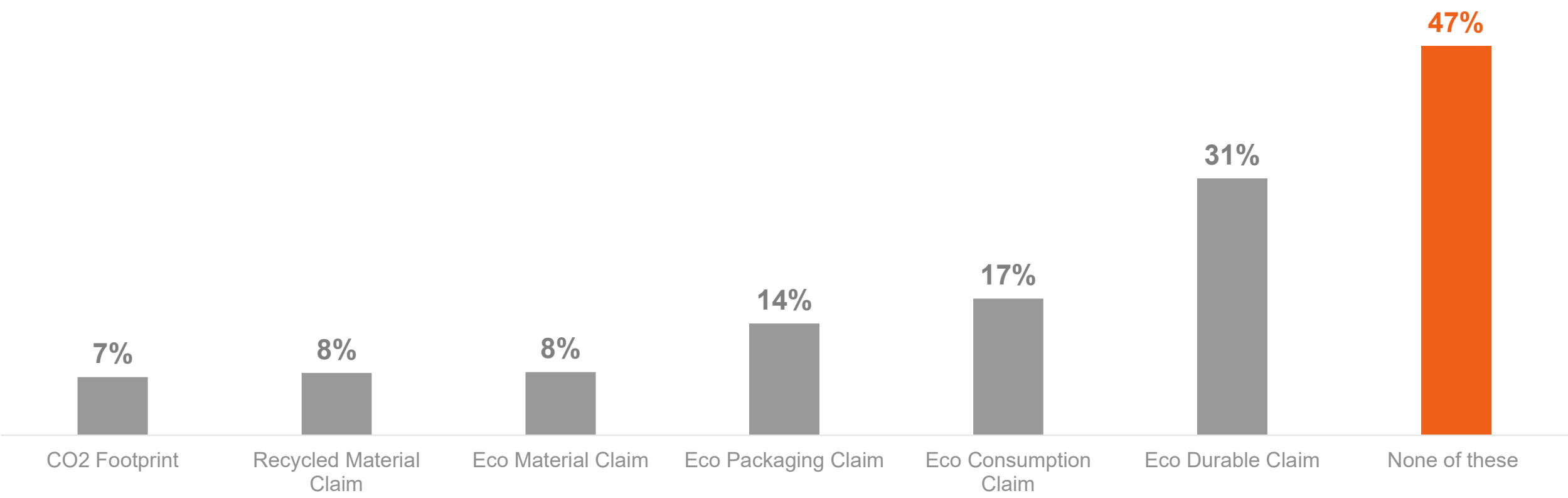
Awareness and trust remains a key challenge & opportunity



Marketing & Communication are required to close the knowledge and awareness gap

Awareness of sustainability features is still falling short.

Awareness of Eco-Claims during purchase decision



Source: Germany, Mobile Computing Purchases; 9,133,158 Shoppers | 16,623 Interviews

Eco Claim features in gfknewron

Indication for “**how products are advertised**” as being environmentally friendly or sustainable

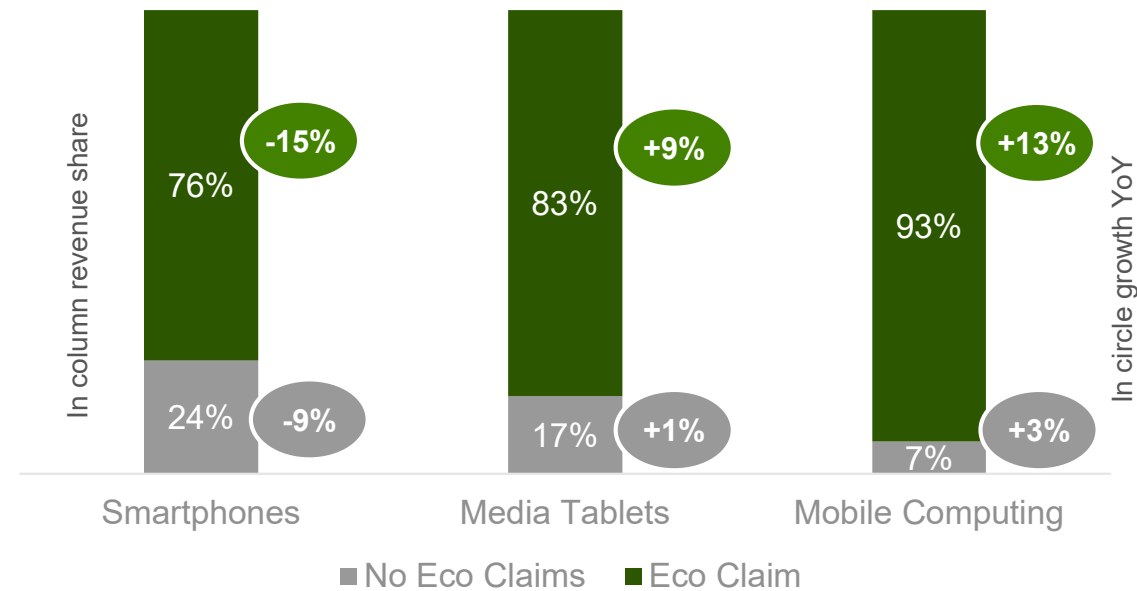
Eco recycled material claim The product or its components (e.g., screws) or accessories supplied with the product (e.g., carrying case, adapters, remote controls) are advertised as being made of (post-consumer) recycled material. No minimum share of recycled material or a specific material required.	Eco material claim The product is advertised in the context of eco sustainability as being made of sustainably sourced materials, natural ingredients, plastic-free alternatives, or not consisting of or using less hazardous materials. Biodegradable/compostable products are also considered if an eco-context is mentioned.	Eco package claim The packaging of the product is advertised as being environmentally friendly/sustainable (e.g., containing recycled and/or sustainably sourced materials). The product itself as well as recyclable packaging are not considered on this feature.	Eco consumption claim The product is advertised in the context of eco sustainability as having or contributing to a low consumption of resources (esp. energy/water) during production or usage of the product.
Eco CO2 footprint claim The product is advertised as being produced carbon neutral or the CO2 consumption during production/transport is being compensated by the manufacturer. Also includes products advertised as having or contributing to low CO2 emissions.	Eco durable claim The product is advertised in the context of eco sustainability as being easy to repair or especially long lasting, or the manufacturer claims to provide updates/upgrades for an extended period because of the positive impact on the environment.	Eco other claim The product is advertised as being environmentally friendly because of its naming, labelling and/or manufacturer initiatives	Eco number of claims How many amongst Eco claims are advertised for the product/packaging by the manufacturer. The number is automatically calculated based on the coding of the 7 Eco claim features on this slide.

Despite awareness gap, products with eco-claims are dominant in sales. Question remains therefore leveraging sustainability for brand positioning.

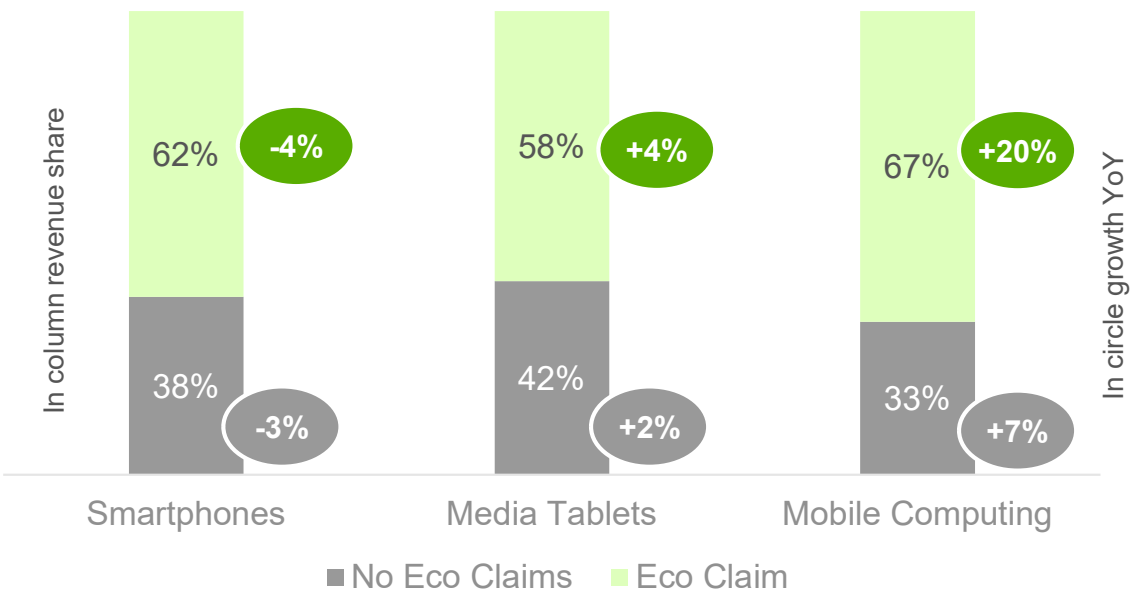


gfknewron Supply Chain
EU6: Sales Revenue EUR% and growth YoY%, FY 2024 vs. FY 2025

gfknewron Supply Chain
Distributor Sales to **Commercial Channels**

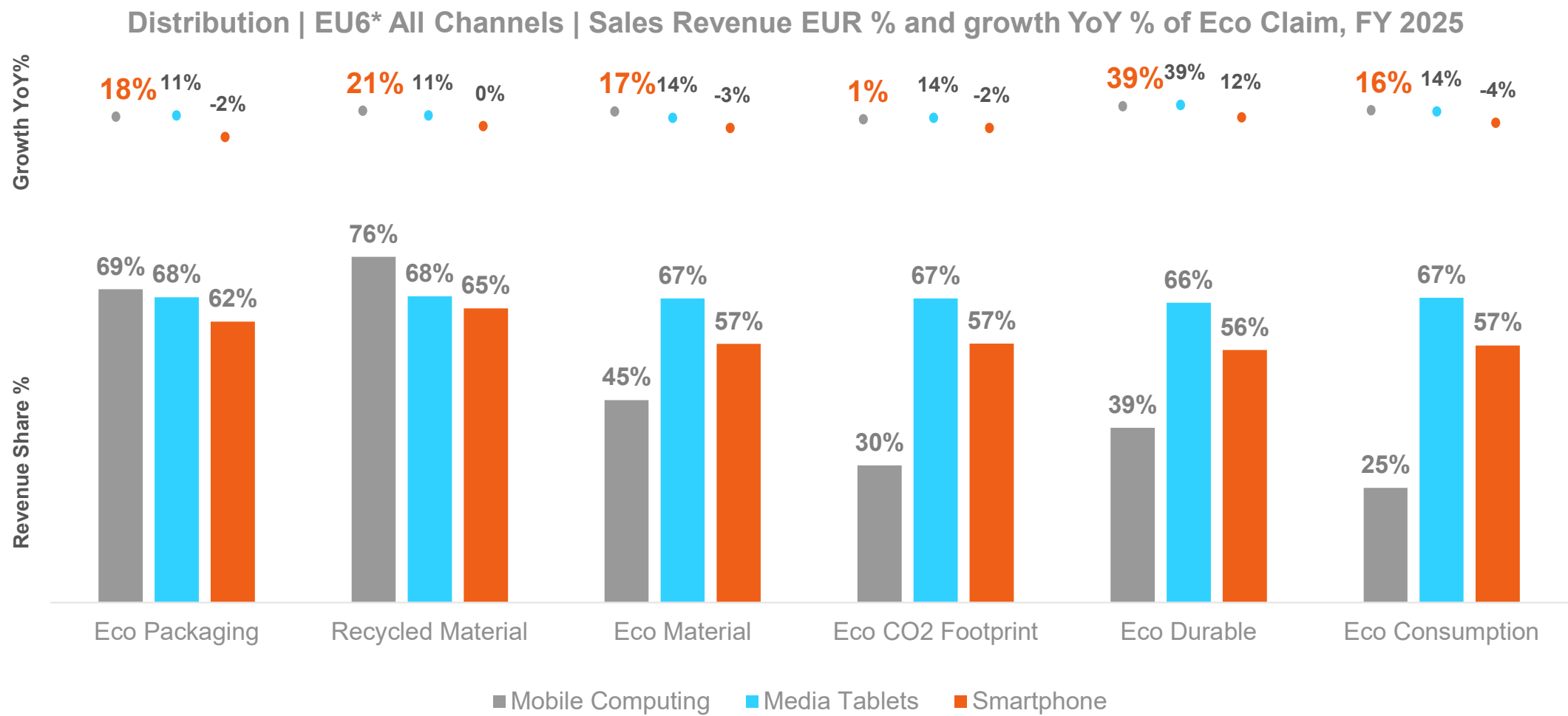


gfknewron Supply Chain
Distributor Sales to **Consumer Channels**



Gfknewron Supply Chain | *EU6= DE,FR,IT,ES,NL,GB

Recycled Packaging & Material Lead Across Devices. Mobile Computing drives Growth overall.



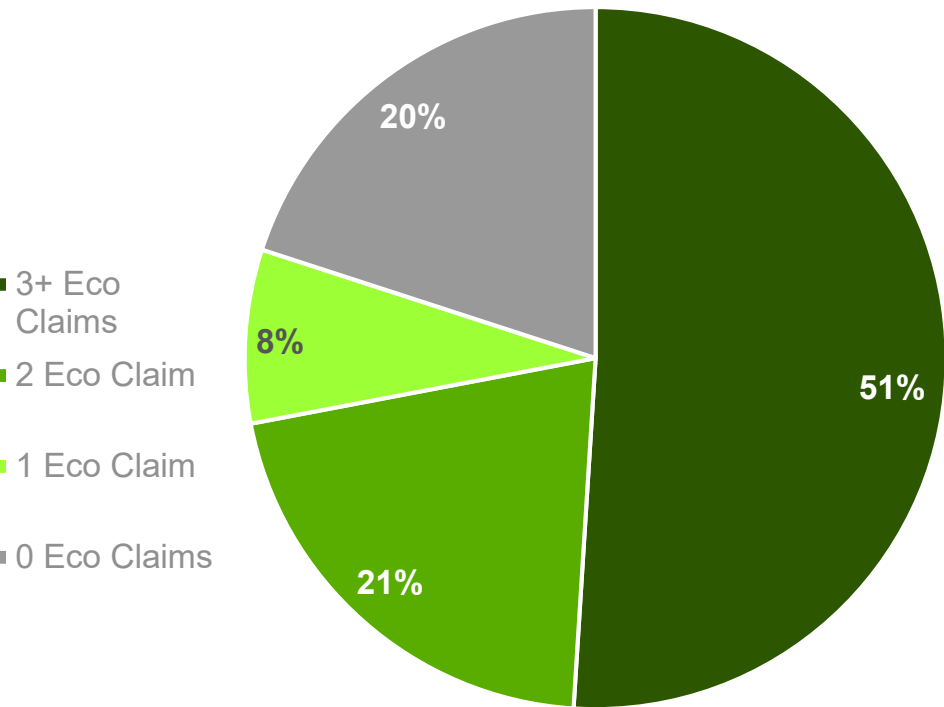
EU6*= DE,FR,ES,IT,NL,GB

gfknewron Supply Chain: Mobile Computing Devices with 3+ Eco Claims dominate the EU6 Distribution Market with growing speed.

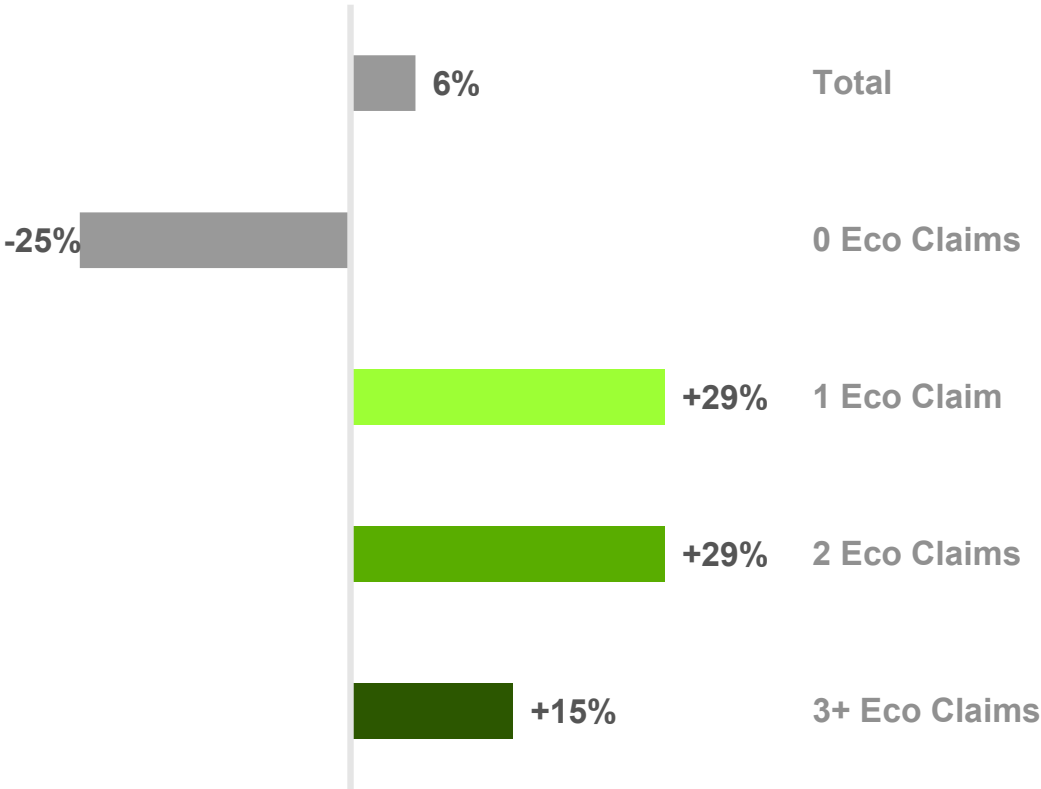


gfknewron Supply Chain
EU6: Sales Revenue EUR% and growth YoY%, FY 2024 vs. FY 2025

Revenue Share FY 2025 Mobile Computing



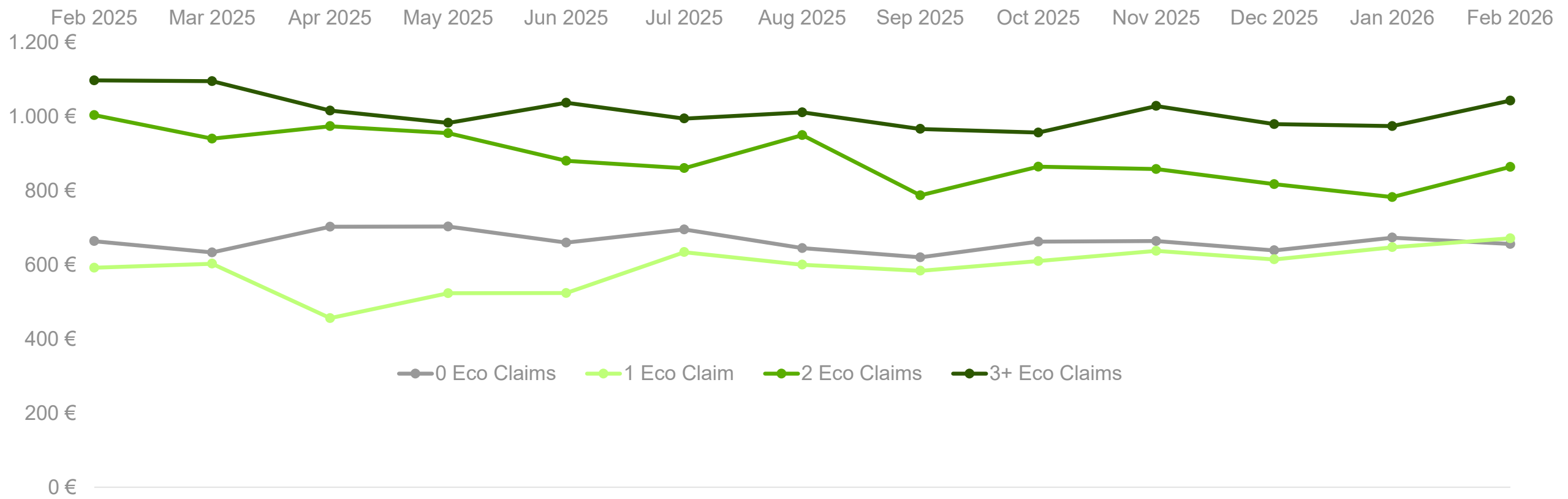
Revenue Change 2025 vs. 2024



EU6*= DE,FR,ES,IT,NL,GB
Market: Mobile Computing in France, Germany, Great Britain, Italy, Netherlands, Spain - Timestamp: 2025 - Brand: - Channel: - Filters: Eco - Number of Claims: 2 Eco Claims, 1 Eco Claim, 0 Eco Claims, 7 Eco Claims, 6 Eco Claims, 5 Eco Claims, 4 Eco Claims, 3 Eco Claims | gfknewron Supply Chain

Sustainability adds to Premium: Products With More Eco Claims Sell at Higher Prices in Distribution

Distribution | Average Selling Price Development by Eco Claims | Mobile Computing, EU6* (MAT)



EU6*= DE,FR,ES,IT,NL,GB

Eco Claims Drive Retailers' Premium in Mobile Computing Sales in EU5*

Retailers' Premium Development by Number of Eco Claims in % | Mobile Computing in EU5*
POS vs. DIS Avg. Selling Price, MAT (Mar25-Feb26)



EU5* = DE,FR,ES,IT,GB



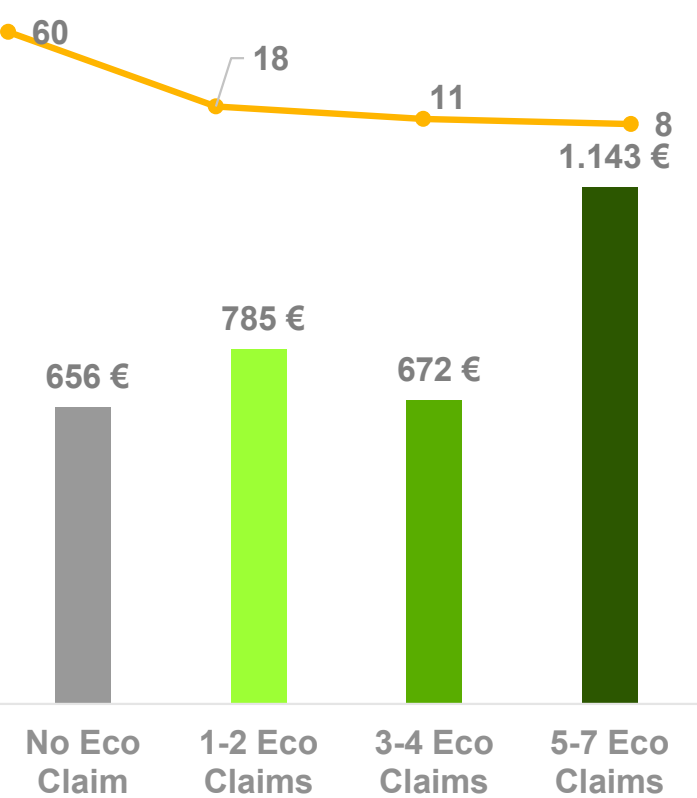
Sustainability as strategic differentiator

5-7 Eco-Claim SKUs Deliver Higher Sell-Through Value with Limited Brand Saturation

Distribution
EU6*: Sales Price in EUR and active brands for Eco Claim, FY 2025

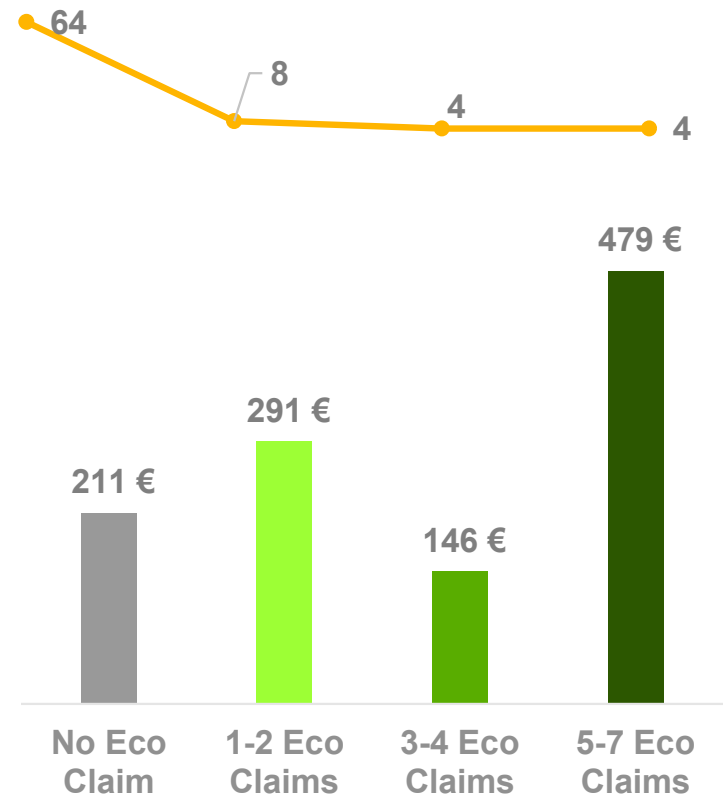
Mobile Computing

Price in EUR No. of Brands



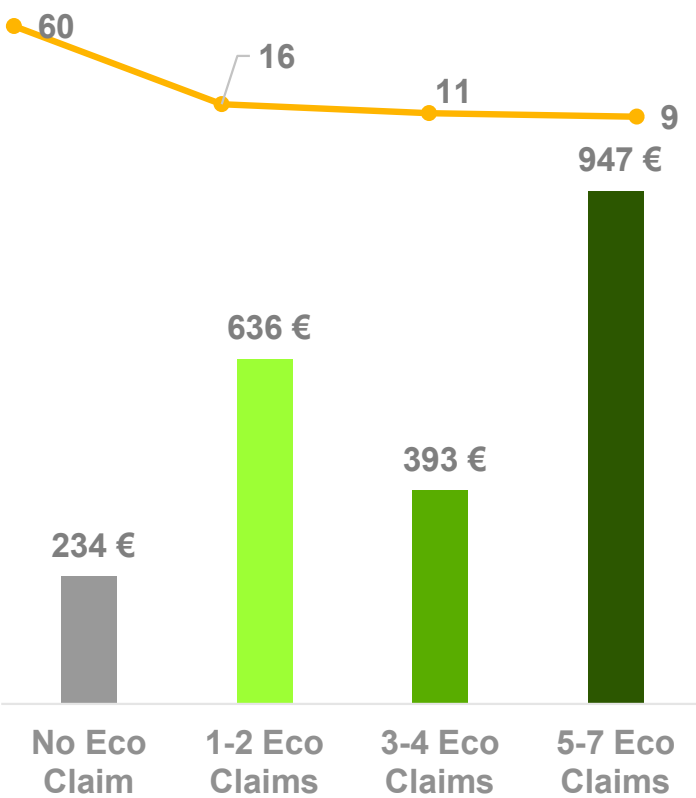
Mediatablets

Price in EUR No. of Brands



Smartphones

Price in EUR No. of Brands

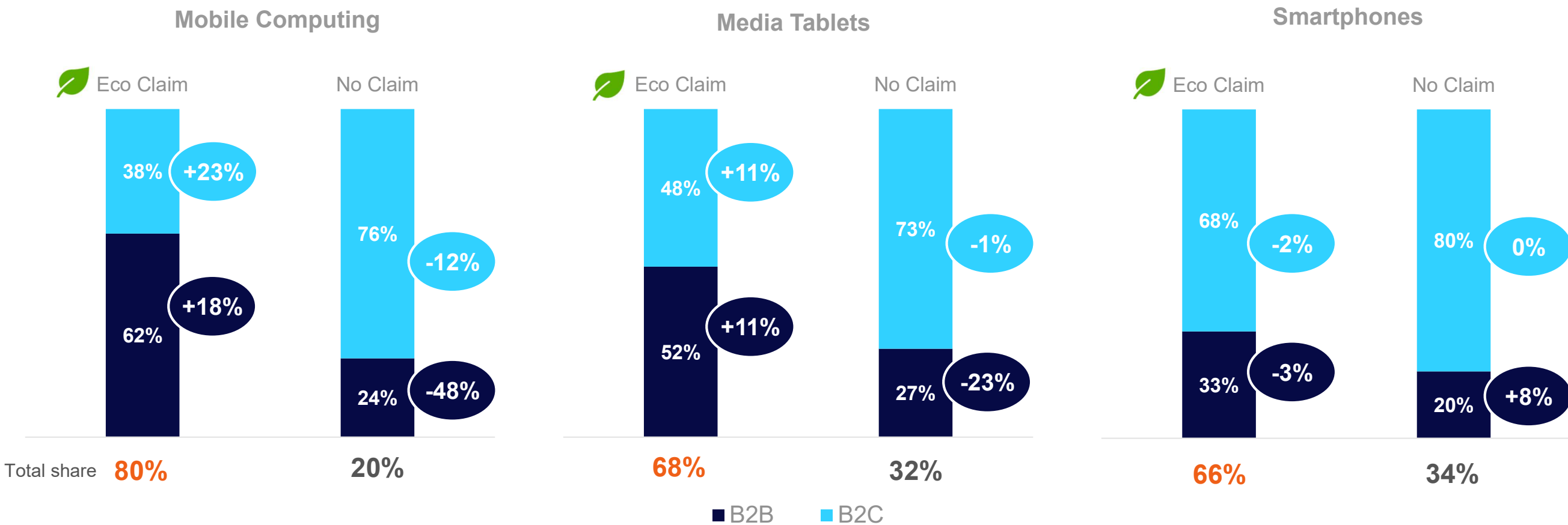


EU6*= DE,FR,ES,IT,NL,GB

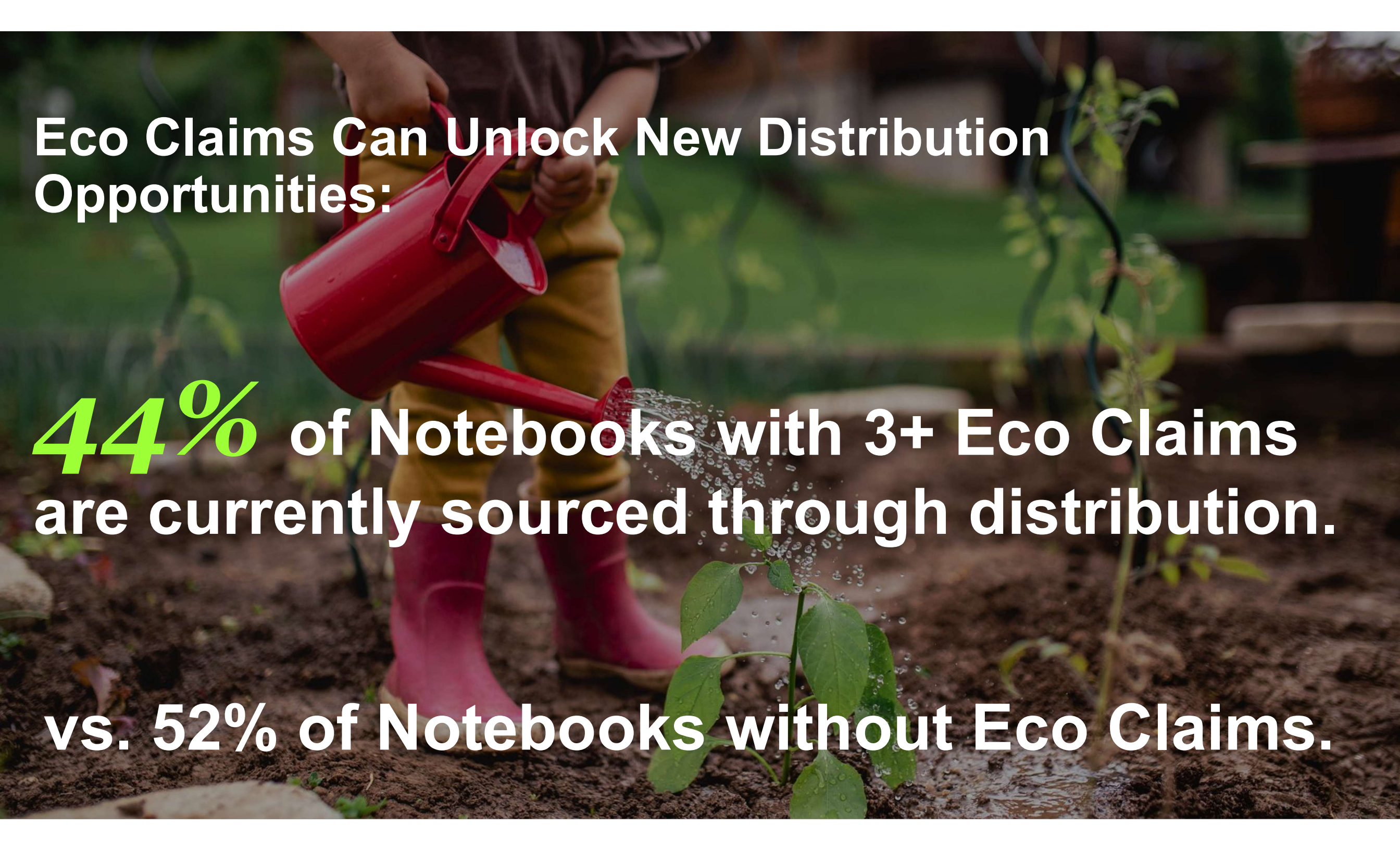
Eco-Claimed devices are not only relevant for Consumers.

Eco claims grow at comparable rates in B2B and B2C, with media tablets showing the most balanced distribution vs. stronger channel differences in mobile computing and smartphones

Distribution | EU6* B2B and B2C Channels | Sales Revenue EUR % and growth YoY % of Eco Claims, FY 2025



EU6*= DE,FR,ES,IT,NL,GB

A person wearing a brown shirt, yellow pants, and pink rubber boots is watering a small green plant in a garden. They are holding a red watering can and pouring water onto the soil. The background is a blurred garden scene with other plants and a wooden fence.

Eco Claims Can Unlock New Distribution Opportunities:

44% of Notebooks with 3+ Eco Claims are currently sourced through distribution.

vs. 52% of Notebooks without Eco Claims.



**Circular economy -
a further growth opportunity?**



Our Refurbished Definition

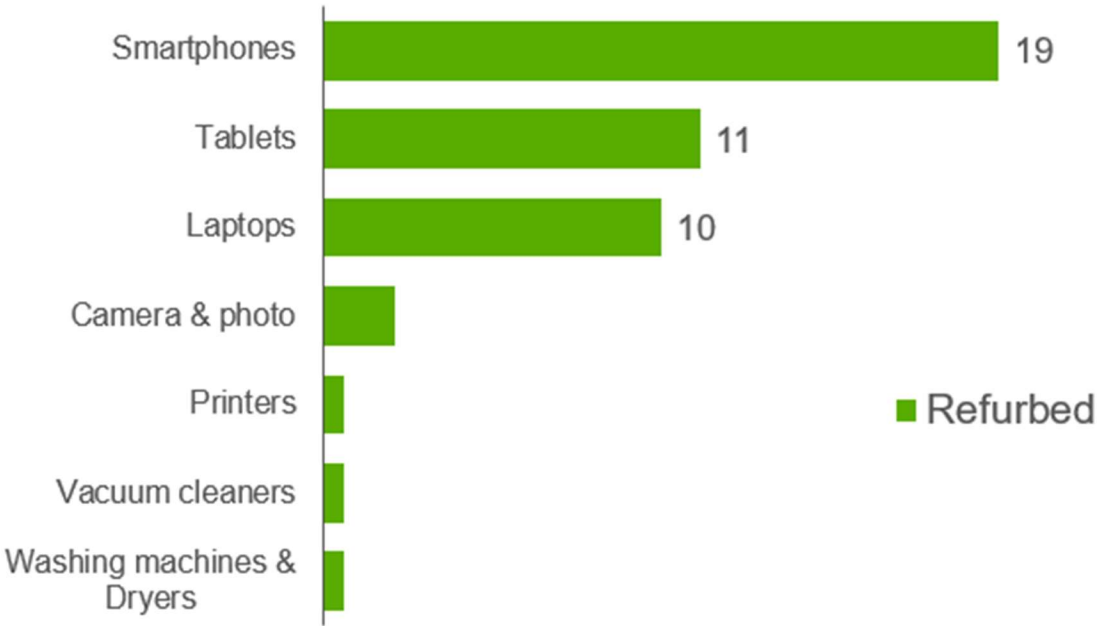
Refurbished products have been previously owned and returned to a manufacturer or vendor. They go through a defined refurbishment process, and are not to be confused with secondhand items, which are effectively sold as they are.

Refurbished items must meet the following standards:

- Cleaned, repaired and fully tested for functionality
- Reset to factory conditions (e.g., data deletion)
- Often new accessories included as available for the new product (e.g., cables, earphones, power adaptors, etc.)
- Warranty provided
- These sales must have clear indication as refurbished product, ideally own SKU number (or EAN) or flag in a separate data field (column) or alternatively stated in article text.

Smartphone and IT categories (Laptops, Tablets) lead the way in refurbished markets

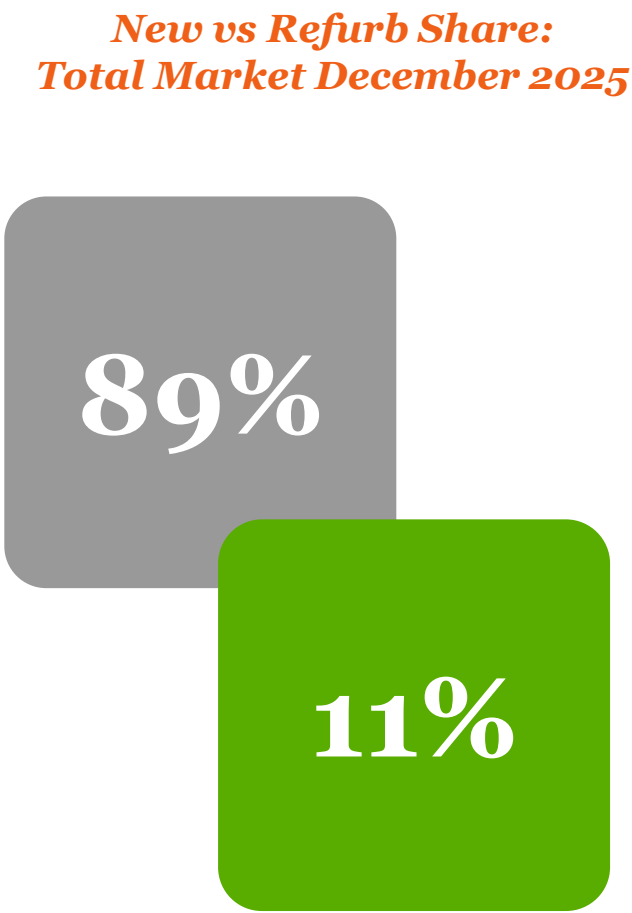
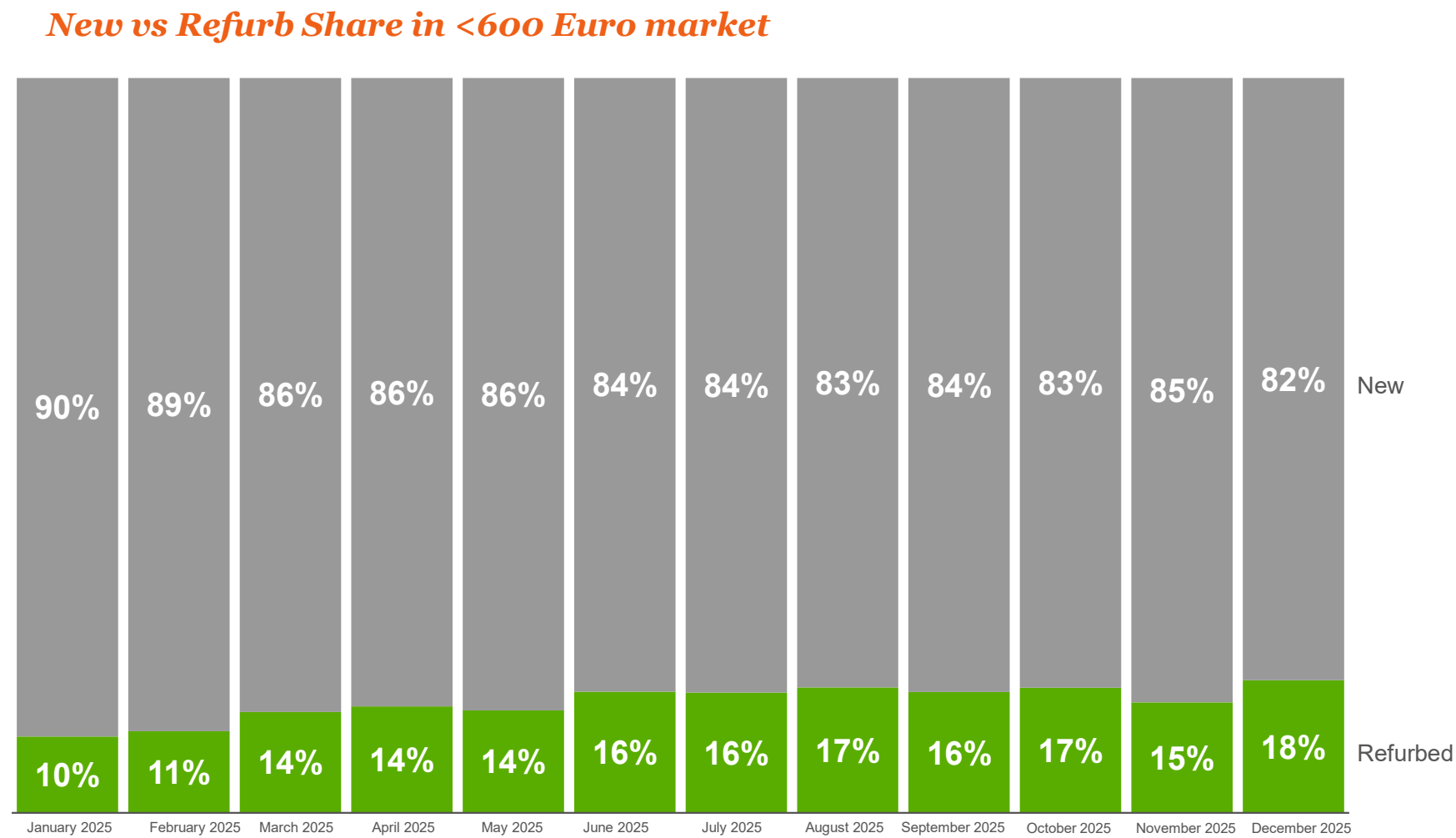
[Digital purchases](#) | online EU5 | 12 months ending April 6, 2025
Share of refurbed in value% (Sample: 101.654 e-receipts)



Source: Digital purchases| EU5 countries, last 52 weeks ending April 6th [Source](#)



Refurbished phones now take up 11% of the POS market in Europe – and 18% of the <600 Euro market



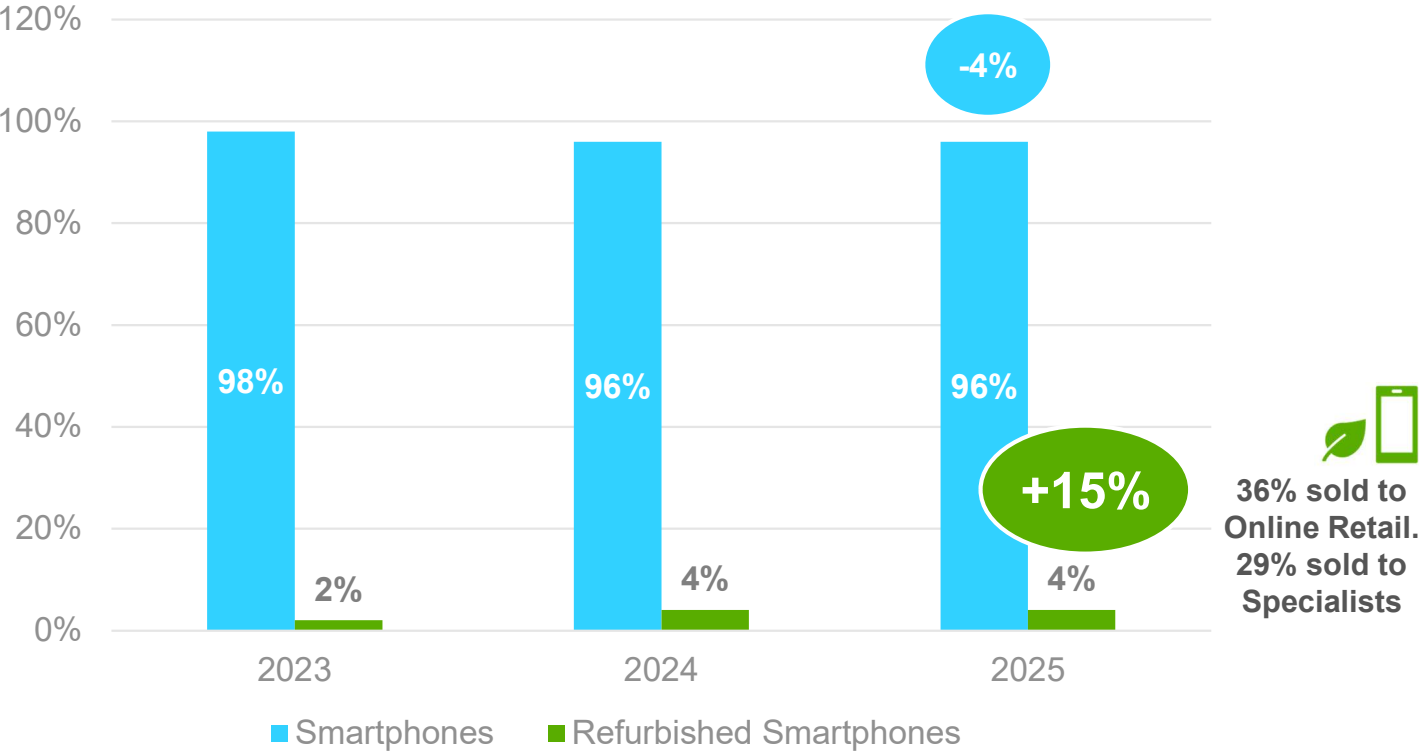
Smart-/Mobilephones, IT,FR,DE,ES,GB,CH | Sales Units

NIQ Market Insights powered by GfK Intelligence

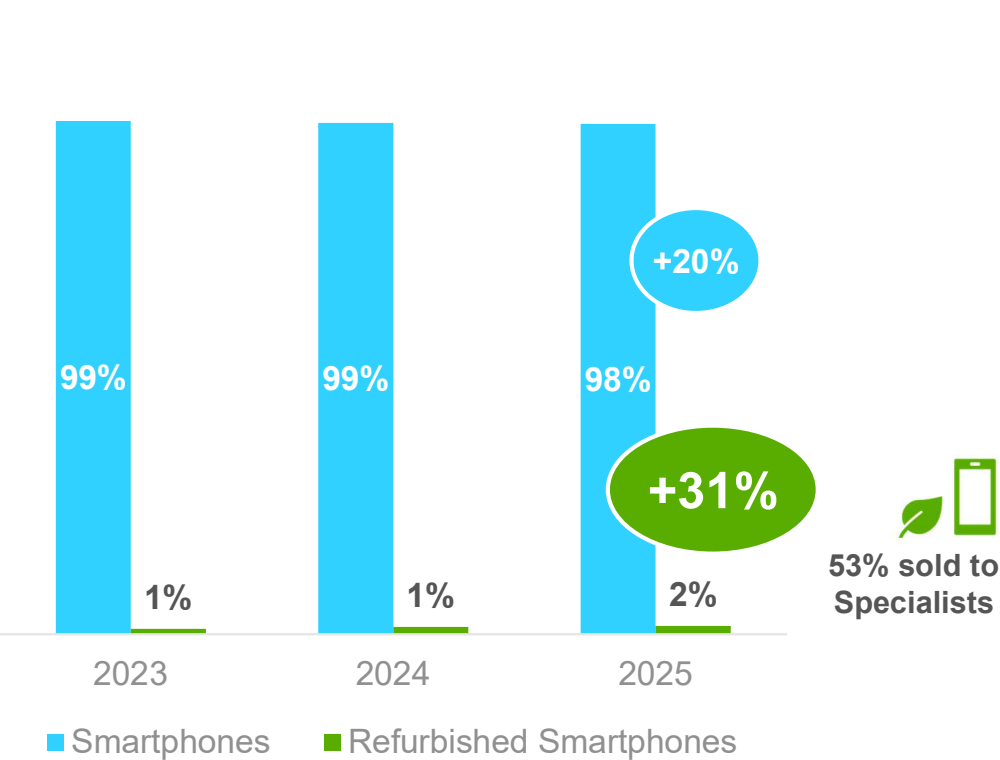
Germany and Spain show a small but increasing value share for refurbished devices, supported by strong growth rates in 2025



Distribution in **Germany** | Sales Value Share %
| Growth Rates 2025 YoY



Distribution in **Spain** | Sales Value Share %
| Growth Rates 2025 YoY

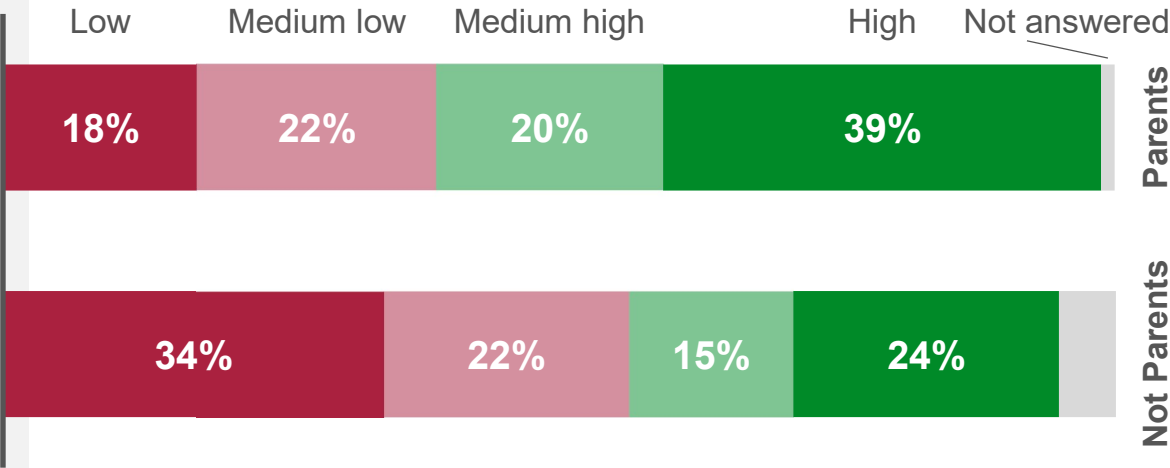


Who is buying
refurbished tech across
the globe?

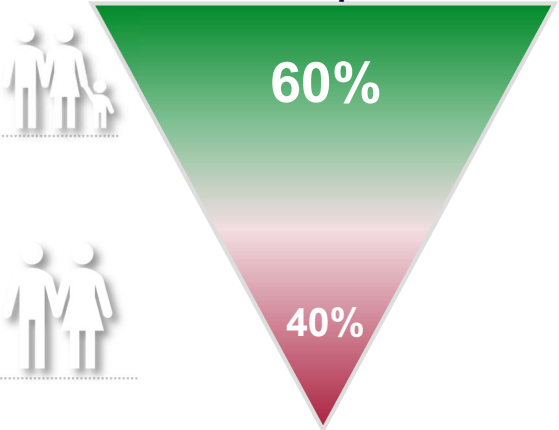


Bought a refurbished/ previously owned technology or
electronic product

Income quantile



Bought a refurbished/ previously
owned technology
or electronic product





Refurbished & Used Mobile Phones Market size
valued at approx. US \$52 Bil in 2021 and is expected to
reach around **US \$146 Bil in 2030**, at a CAGR of
about **11.45%***

Sustainability as a Growth Engine in Tech & Durables



Sustainability is expected, even in uncertain times

- **Sustainable values remain strong** and corporate environmental responsibility ranks as a top expectation



Brands face a recognition gap – creating an opportunity for differentiation

- Eco-friendly options are wanted, but **most T&D brands** are **not yet perceived** as **sustainable**



Circularity is accelerating, driven by Gen Z & value conscious shoppers

- **Refurbished tech** is becoming mainstream, **reshaping demand** across Europe and beyond



Eco Claims deliver tangible business impact

- **More eco claims** = higher revenue share, stronger YoY growth, better margins, higher ASPs and broader channel diversification



Sustainability is a strategic differentiator for the future

- **Companies** that invest in credible eco attributes, transparent communication and circular solutions **will capture the next wave of growth**

Spring is coming!
Are you ready to harvest?



Did you know?

We track **120+**
sustainability attributes!



NIQ Catalog

...provides standardized
product data catalogs for more
than 20 million products in
multiple languages globally



20.4 M

Global Products
in Catalogue



70,505

Brands
represented



76

Global markets
served

**Get access to product data, product images, marketing text,
product specifications, merchandising information, rich
content and more in various product data catalogs available
around the world.**

[GfK Utilize Online Product Content - The World's Leading Provider of ECommerce Product Content](#)

Curious to know more?

Learn how we support **sustainability**, **refurbished**, or **eco-tracking** & reach out to us!



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