The innovations driving growth in Tech & Durables

Namrata Gotarne | Michael Rotolo | Frank Landeck
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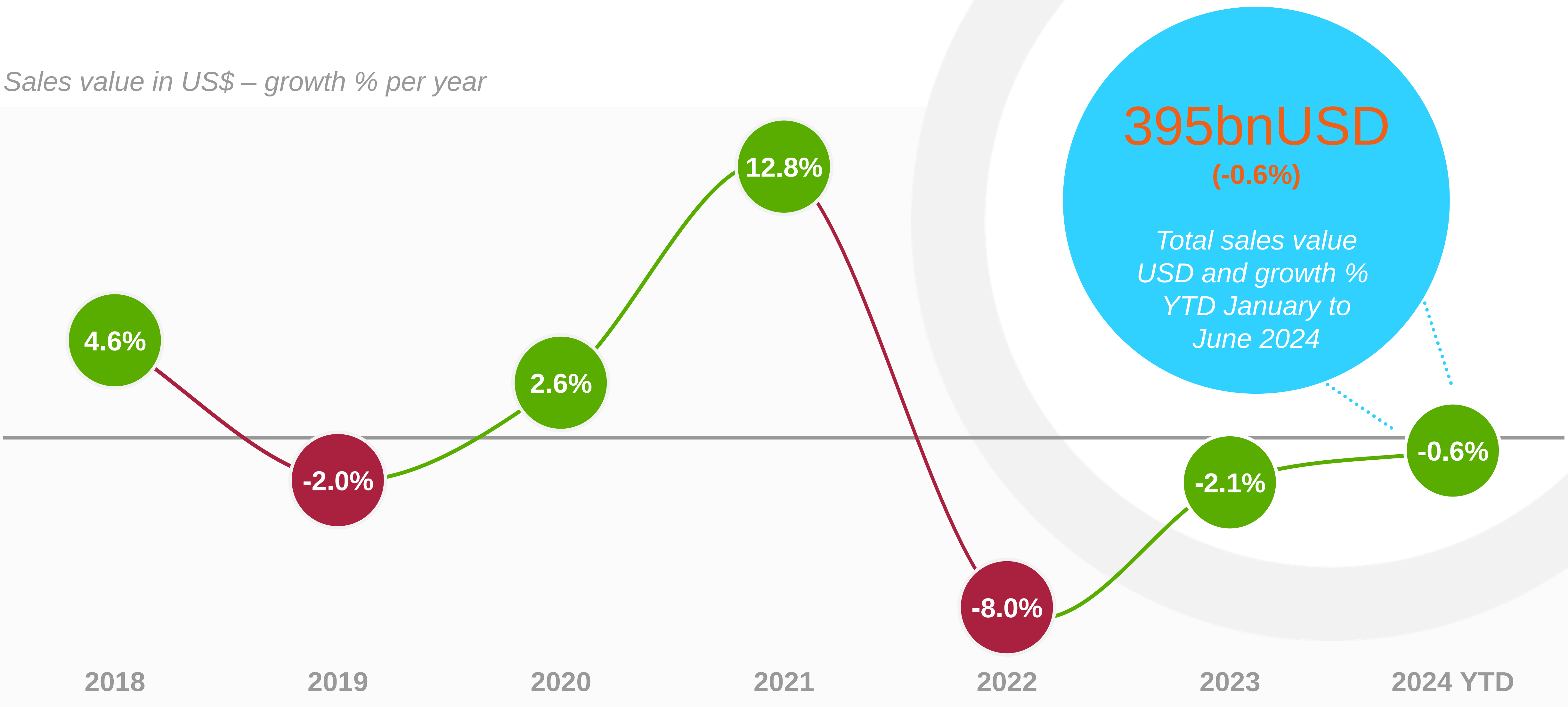
TCG shows steady post pandemic recovery

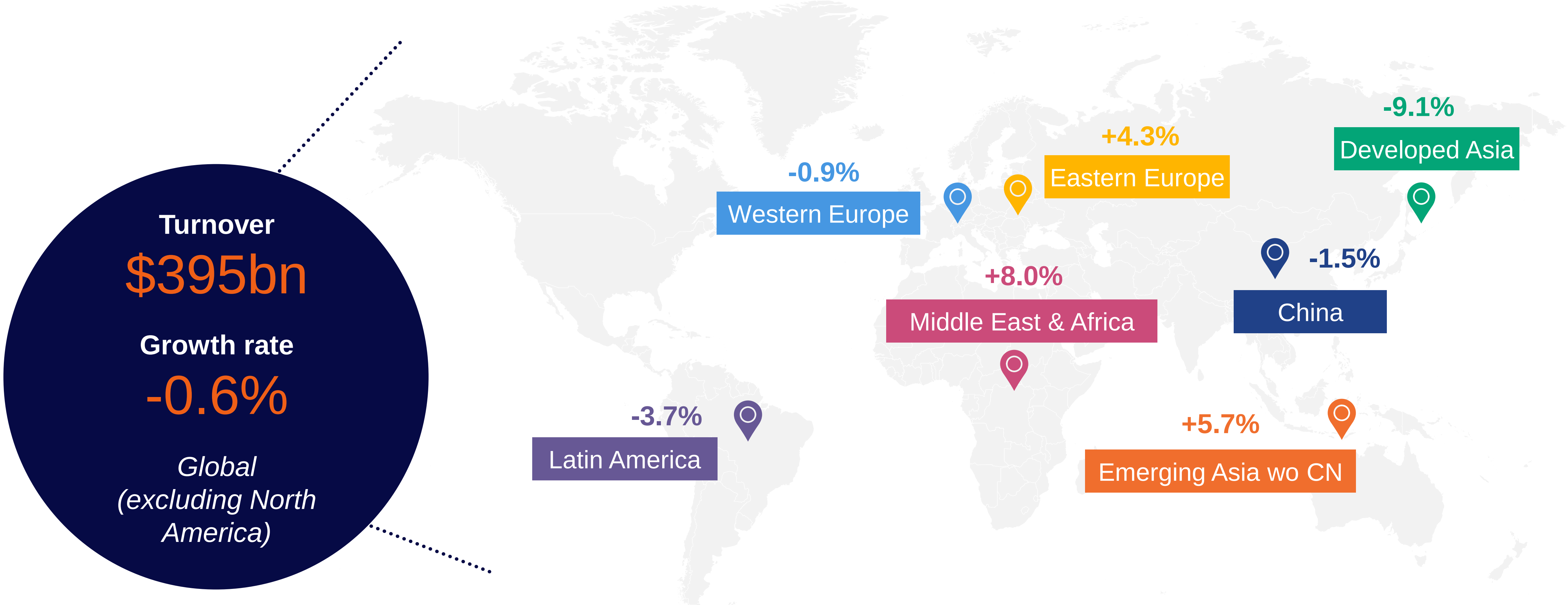
Sales value in US$ – growth % per year



Source: Market Intelligence Sales Tracking Global excl. NA Period : 2018-Jun 2024

Divergence across regions

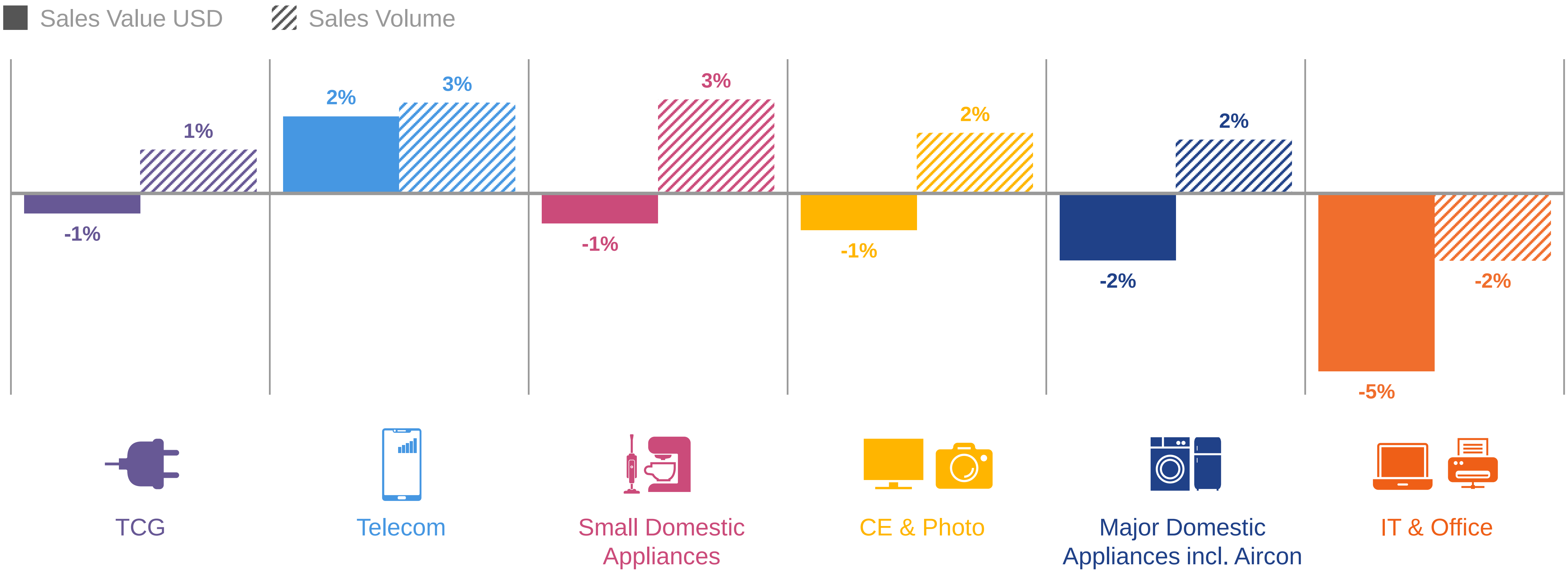
Global (ex NA) Tech and Durables | Sales Value USD (NSP) share | Growth rate YoY | Year To Date: Jan 24 – Jun 24



Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America), Sales revenue growth 2024 vs 2023 | Global TCG Trends Report Q2 2024 – Global Strategic Insights

Consumers are buying, whilst prioritizing affordability & value

Global (ex NA) Tech and Durables | Sales Value USD (NSP) | Sales Units | Growth rate YoY | Year To Date: Jan 24 – Jun 24

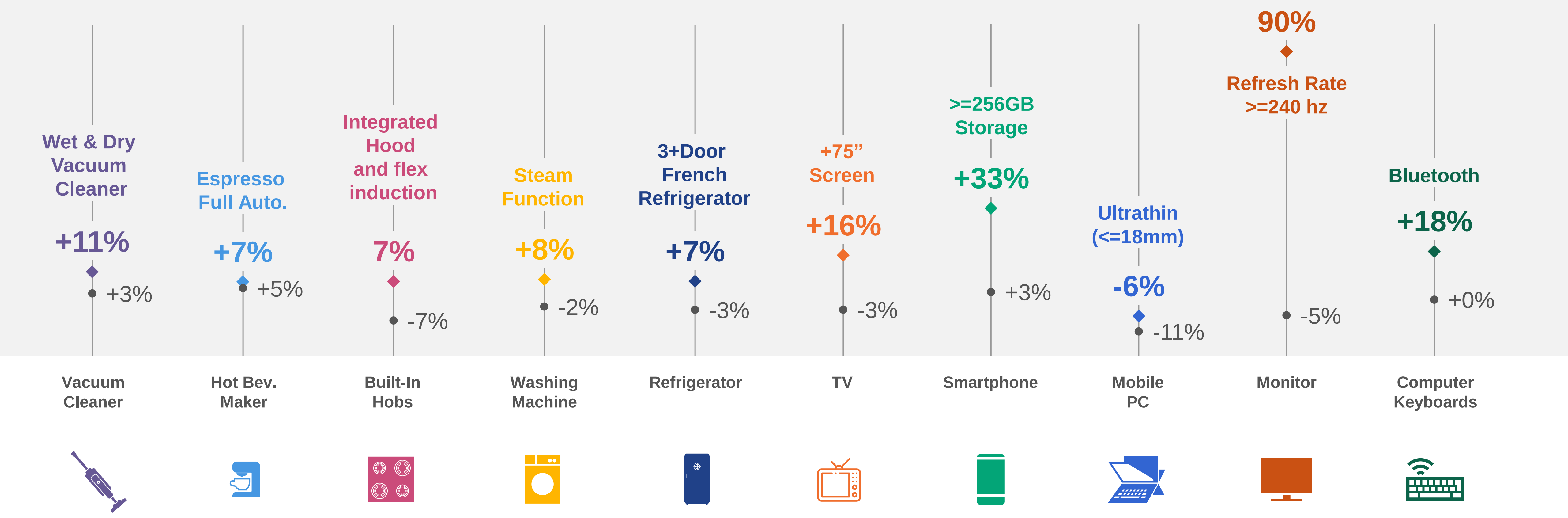


Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America), Sales revenue growth 2024 vs 2023 | CE includes Multifunctional Technical Devices and SDA includes Personal Diagnostics | Global TCG Trends Report Q2 2024 – Global Strategic Insights

Niche growth driven by innovative features

Premium segment example (colour data) vs. category total (grey data point)

Jan–Jun 24 | Sales value USD growth YoY %



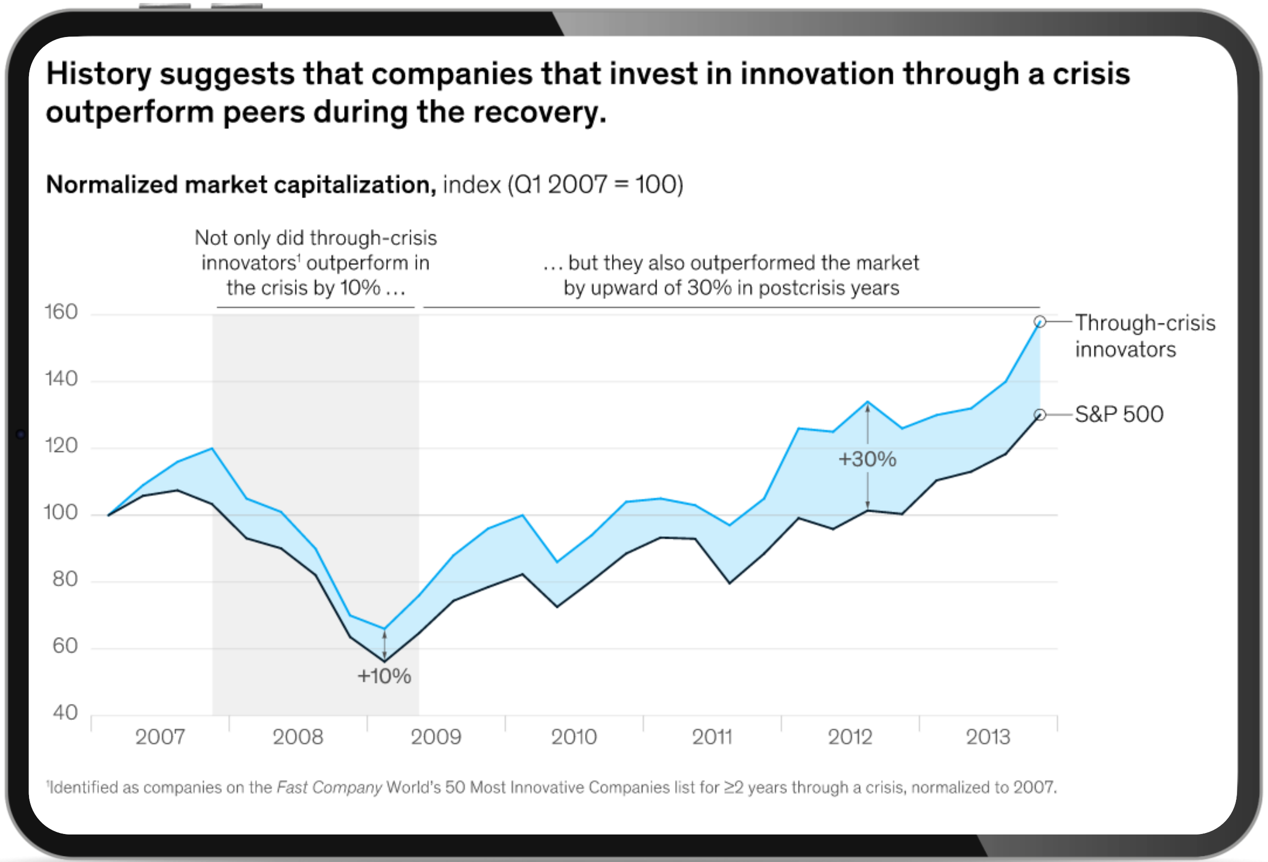
Source: GfK Market Intelligence Tracking Retailer Market Sales Value USD growth rate YoY Period Jan-Jun 2024 Global excl North America | Global TCG Trends Report Q2 2024 – Global Strategic Insights | *NVME =Non-volatile memory express

Innovation in challenging times is critical

> "The clear lesson is those who innovate through a crisis come out stronger."

McKinsey & Co

"Innovation: The Launchpad out of the Crisis" September '21



Source: McKinsey & Co "Innovation: The Launchpad out of the Crisis" September 2021

Core principles of successful innovation

Experiences

1

System

2

Culture

3

Process

4

Successful innovation

Examples

Dyson Supersonic

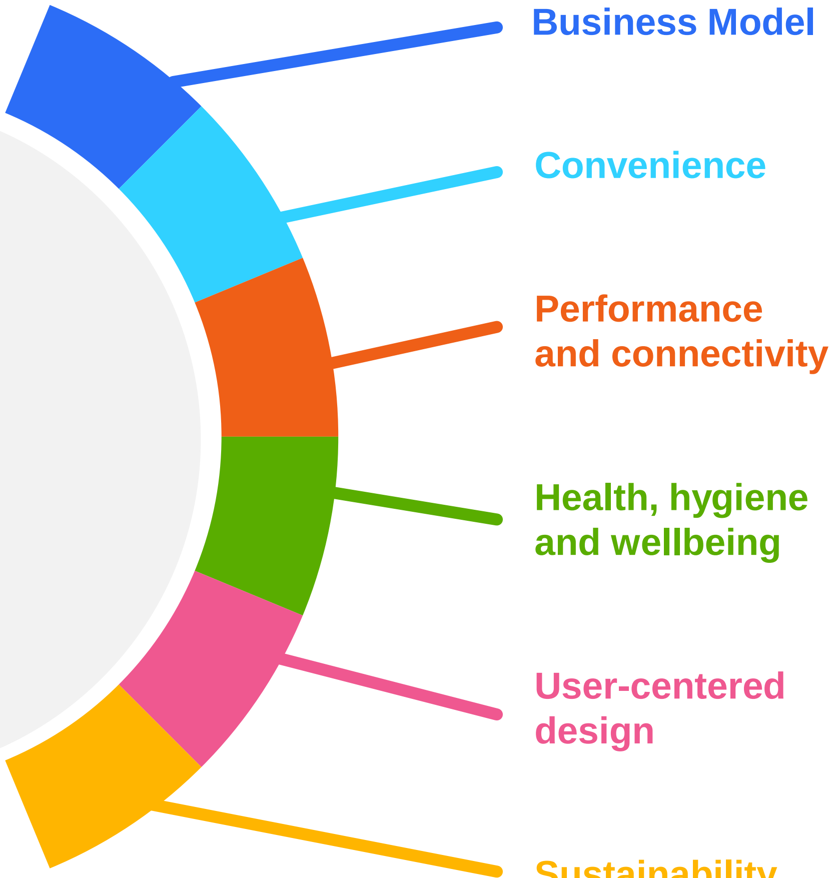
Amazon Echo

Source: GfK MI data | Sales Value / Value Share 12 months after launch within EU5 (France, Germany, Great Britain, Italy and Spain) Dyson Supersonic launched April 2016, Amazon Echo September 2016

Innovation Framework

Very important to consumers for getting “value” from a product or a service (ranking)

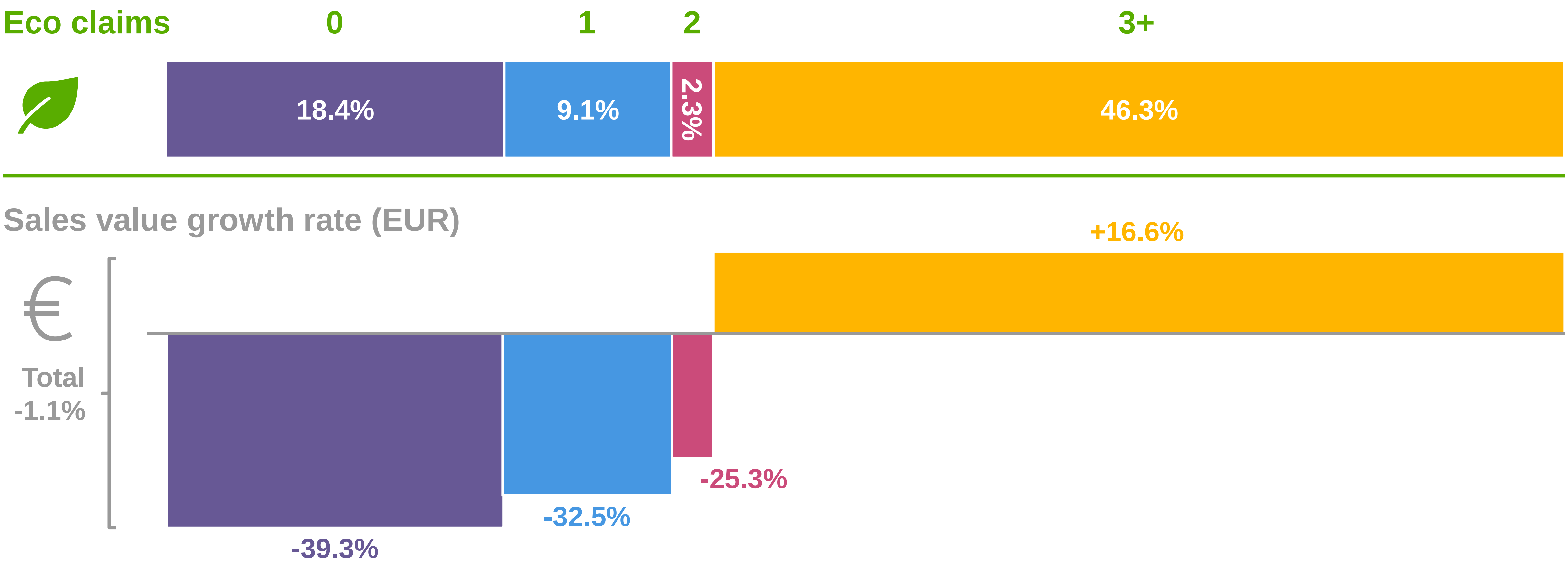
	2024	
Durability	#1	
Quality	2	
Convenience	3	↑
Trust	4	↑
Eco-friendly	5	↑
Personalization	6	
Feature-rich	7	↑
Affordability	8	
Good design	9	



Source: Consumer Life 2024 – global data

For almost half of the products sold, marketing claims three or more eco messages – and those products are the growth engine of the market

Smart+Mobile Phones | January to November 2023 | Feature Shares and Growth



Source: Panelmarket 5 CTR WE (DE,ES,FR,GB,IT), Feature shares and growth | January 2023 - November 2023, Sales Value (NSP) EUR,Growth Rate PY | PRJ 249348 - RG 5905462 - RP 43601341 - ID 622678079

Questions?

Thank you

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