



GLOBAL MOBILE

— ASSOCIATION —

SUPPORTING THE SECONDARY MOBILE ECOSYSTEM

GLOBAL MOBILE ASSOCIATION EXECUTIVE WHITE PAPER SERIES

Unlocking Global Device Supply

Closing the Collection Gap in the Secondary Mobile Ecosystem

- **5–10 billion** — mobile phones are estimated to be sitting dormant worldwide
- **3.2%** — projected 2025 growth in used smartphone shipments, compared with 1.0% for new smartphones
- **\$6.4 billion** — returned to U.S. consumers through mobile trade-in programs in 2025

Global Analysis | 2026 Edition

Prepared by GMA Research and Insights

ABOUT THIS PUBLICATION

About the Global Mobile Association

The Global Mobile Association exists to serve the global used mobile ecosystem by bringing members together year-round through education, resources, leadership development, advocacy, business support, and meaningful industry connection.

Purpose of This White Paper

This report examines one of the largest structural constraints facing the global secondary mobile market: the inconsistent supply of commercially viable devices. It analyzes why phones fail to enter organized channels, how device age and product mix affect economics, where supply and demand are misaligned, and what the ecosystem can do to build more predictable, responsible, and profitable supply pipelines.

Scope

The analysis covers consumer trade-in, direct acquisition, carrier and retailer programs, family transfer, dormant devices, international sourcing, device age, premium-model concentration, inventory economics, cross-border movement, and the operating systems required to convert potential supply into saleable inventory. It does not create or propose grading standards.

Important Notice

This paper is intended for education and strategic planning. It is not investment, legal, customs, tax, sanctions, environmental, or accounting advice. Market estimates vary because public sources use different definitions of used, refurbished, pre-owned, traded-in, and secondary devices.

Working hypothesis The industry does not suffer from an absolute shortage of devices. It suffers from a conversion problem: too few devices move from potential availability into documented, commercially viable supply at the right time and in the right market.

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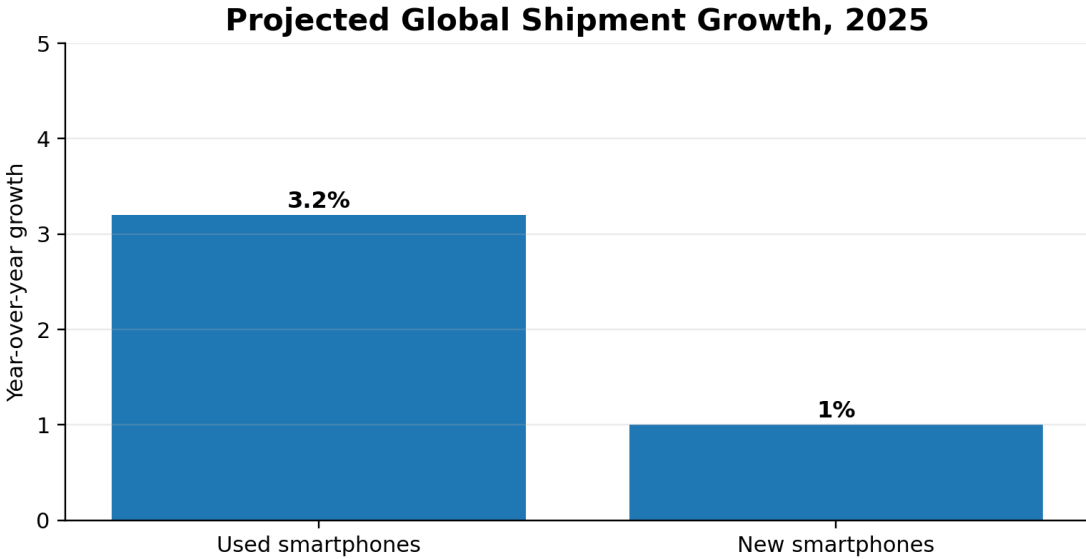
Working Definition of Supply

In this paper, supply means devices that can legally and economically move into a documented secondary-market channel. Theoretical availability is not supply until ownership is clear, the device is collected, restrictions are identified, processing economics are understood, and a responsible downstream outcome is available.

EXECUTIVE SUMMARY

The Market Is Growing Faster Than Its Supply System

IDC projected global used smartphone shipments to grow 3.2% in 2025, compared with 1.0% for new smartphones. Counterpoint reported 5% growth in global refurbished smartphone sales in 2024, followed by slower but continued growth in the first half of 2025 as macroeconomic uncertainty and supply challenges increased. [1–3]



Source: IDC 2025 forecast. Public forecasts use different definitions and should be read directionally.

Demand is not the central limitation. The industry struggles to secure enough recent, unlocked, supported, economically processable devices with predictable documentation and downstream demand. The shortage is most visible in newer premium models, where buyer interest and residual value are strongest.

Six conclusions for industry leaders

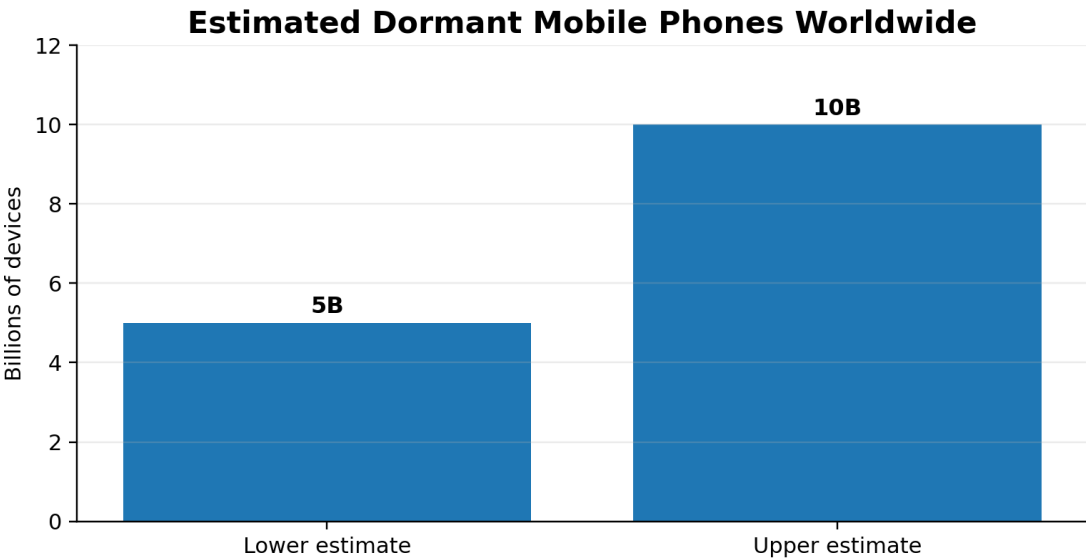
- Collection, not theoretical device availability, is the first supply constraint.
- Longer ownership cycles delay supply and increase average device age, even as devices remain useful for longer.
- Premium-model concentration supports value but creates brand and model dependency.
- Trade-in programs are essential supply infrastructure, but reach and economics remain uneven by country and customer segment.
- Global demand and supply do not naturally match; successful operators need market-specific routing, regulatory discipline, and working capital.
- Companies that measure realized yield, cycle time, contribution margin, and cash conversion by source will outperform those buying on headline price alone.

1 | MARKET STRUCTURE

The Supply Paradox

The secondary mobile ecosystem faces a paradox. Billions of phones exist outside organized channels, yet professional buyers repeatedly report difficulty sourcing the models and quantities their customers want. The problem is not scarcity in the conventional sense. It is a mismatch between potential stock and usable commercial supply.

GSMA estimates that 5 to 10 billion mobile phones are sitting dormant worldwide. In its 26-country consumer research, approximately three-quarters of respondents reported keeping at least one previous phone unused. These devices represent residual value, but they remain unavailable to trade-in, resale, donation, or responsible recycling until owners act. [4,5]



Source: GSMA global consumer research. Dormant-device estimates are ranges rather than audited inventory counts.

Working hypothesis The largest untapped supply pool is not a warehouse or carrier program. It is the global stock of dormant devices whose owners have not been given enough reason, trust, or convenience to release them.

1 | MARKET STRUCTURE CONTINUED

Commercial Supply Requires Five Conditions

- Clear legal ownership and authority to transfer the device.
- Physical collection through a reliable channel.
- Known lock, finance, account, and network status.
- Processing economics that support reuse, parts recovery, or controlled recycling.
- A buyer, market, or responsible disposition route capable of absorbing the device.

Why high demand can coexist with weak supply

The most desired devices are not evenly distributed. Recent flagship models are concentrated in higher-income markets and premium customer segments. Older or lower-value devices may be more abundant but less attractive to organized buyers after processing, freight, warranty, and compliance costs. The market therefore experiences shortage and surplus at the same time, depending on model, age, condition, geography, and channel.

The operational implication

Supply must be managed as a system rather than as a purchasing activity. Marketing, customer incentives, logistics, fraud controls, receiving, reconciliation, processing, sales demand, working capital, and compliance all influence how much quoted inventory becomes collected cash.

Potential stock	Conversion requirement	Commercial outcome
Dormant consumer devices	Owner engagement, valuation, data transfer, logistics	Trade-in, resale, family transfer, or recycling
Carrier and retailer programs	Promotion, customer conversion, collection, reconciliation	Structured recurring supply
Business or institutional devices	Ownership authority, data controls, collection schedule	Batch supply with documentation
International sources	Classification, trade documentation, transport, destination demand	Cross-border market allocation

2 | SUPPLY CHANNELS

How Devices Enter the Secondary Market

No single source can provide enough predictable volume across market cycles. The strongest operators build a portfolio of acquisition channels and understand the distinct economics, risks, and device mix associated with each.

Primary supply channels

Source	Strength	Primary risk
Carrier and retailer trade-in	Structured customer access and recurring volume	Promotional dependence, reconciliation, fraud
Direct consumer acquisition	Pricing flexibility and broader reach	Customer trust, logistics, conversion cost
Insurance and protection flows	Recurring replacement volume	Model mix, condition, contractual limits
Business and institutional programs	Batch volumes and documented ownership	Data handling, deployment cycles, concentration
Wholesalers and distributors	Speed and market access	Price competition, documentation, inconsistent mix
Marketplaces and auctions	Access to diverse inventory	Variable quality, fraud, fees, limited inspection
Family transfer and informal reuse	Extends useful life	Little visibility into future return or support

Source diversity reduces dependency, not complexity

Adding sources can reduce reliance on one carrier, retailer, buyer, brand, or geography. It also increases the number of processes the company must control. Every source requires clear purchase assumptions, fraud controls, custody, transport, receiving, reconciliation, processing, disposition, and financial measurement.

2 | SUPPLY CHANNELS CONTINUED

The Source-to-Sale Funnel

- Devices offered or quoted
- Devices accepted by owner
- Devices physically collected
- Devices received and reconciled
- Devices eligible for resale
- Devices processed and available
- Devices sold and paid
- Devices returned, disputed, or redirected

Every stage can leak supply. A program may generate strong quote volume but weak customer acceptance. Collected devices may fail reconciliation, remain locked, arrive later than expected, or require more processing than forecast. Available inventory may then sit too long because the product mix does not match buyer demand.

Working hypothesis The biggest supply gains may come from improving conversion inside existing programs rather than adding new sourcing channels. Better follow-up, logistics, data, reconciliation, and routing can increase output without increasing quote volume.

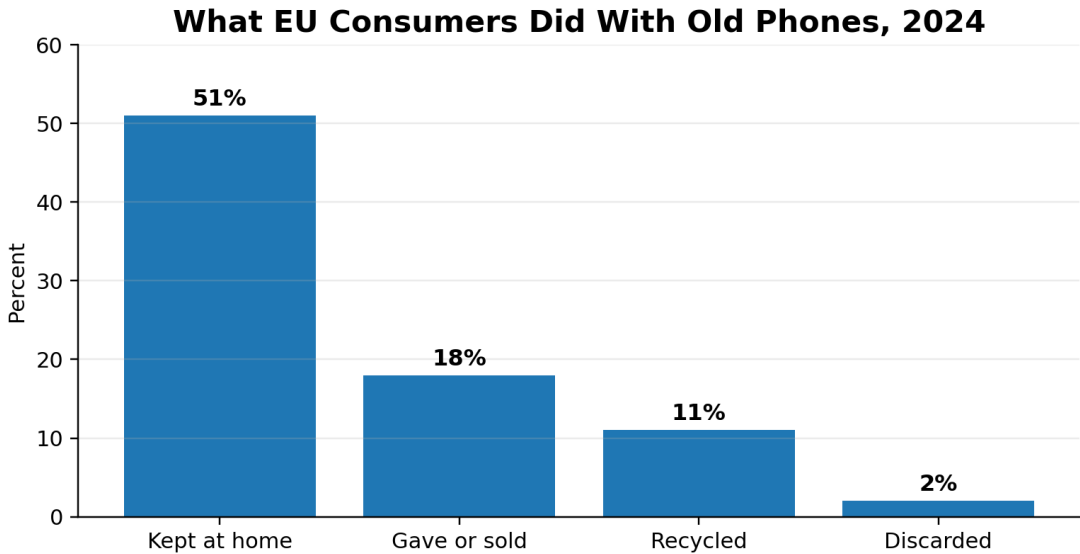
What to measure

Funnel stage	Core measure	Management question
Offer	Quote volume and offer acceptance	Is the value proposition competitive and trusted?
Collection	Completion rate and cycle time	How much accepted supply actually arrives?
Receiving	Shortage and exception rate	Are inbound records accurate?
Eligibility	Saleable yield and lock rate	How much inventory can enter productive channels?
Processing	Throughput and rework	Where does supply wait or lose value?
Sale	Days to cash and contribution margin	Which sources create productive value?

3 | CONSUMER SUPPLY

Dormant Phones and Consumer Friction

GSMA consumer research identifies several reasons phones remain unused: owners want a backup device, fear losing photos or personal data, are emotionally attached, do not know the device value, or do not know where to return it. The collection problem is therefore behavioral and trust-based, not simply financial. [4,5]



Source: Eurostat. Consumer behavior varies by country; this figure illustrates the scale of storage relative to active return pathways.

The dormant-device decision

- Keep as backup
- Retain because data transfer feels incomplete
- Wait for a higher offer
- Give to family later
- Store because the return process is inconvenient
- Avoid return because of privacy or fraud concerns
- Assume the device has little or no value

3 | CONSUMER SUPPLY CONTINUED

What Increases Return Participation

- A competitive and understandable offer
- Immediate or near-immediate payment or credit
- Simple data transfer and erasure support
- Convenient retail, mail-back, pickup, or event-based collection
- Transparent treatment of locks, damage, and exceptions
- A credible explanation of reuse and end-of-life outcomes
- Reminders timed to upgrades, contract milestones, and new product launches

Trust is part of the offer

A higher price cannot compensate for uncertainty about data, ownership, timing, or dispute resolution. Collection programs should explain what happens before, during, and after the handoff. The strongest programs reduce cognitive load and make the decision feel reversible until the owner is confident that data, value, and ownership transfer are handled correctly.

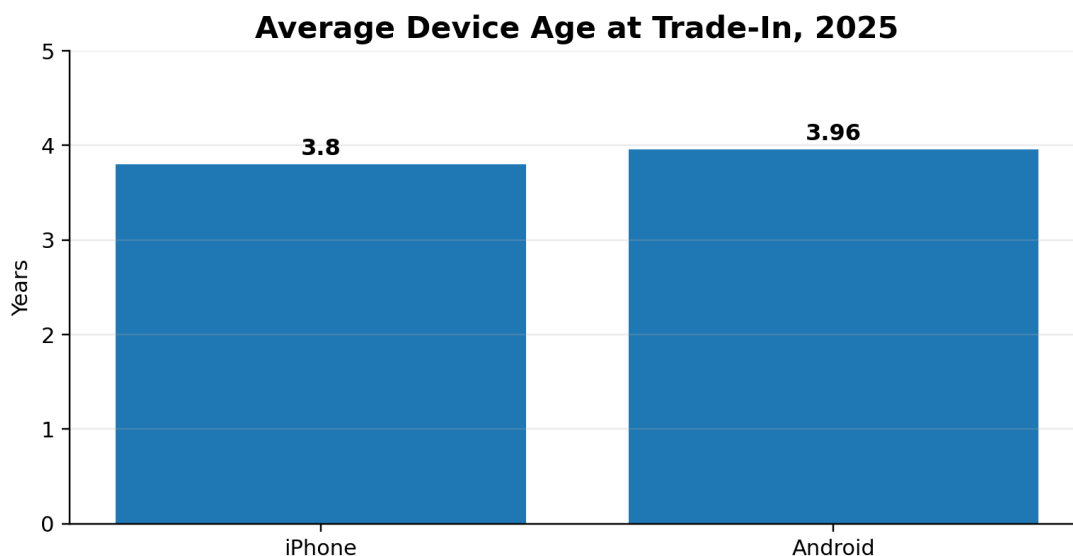
Working hypothesis Dormant-device activation will become one of the most important supply capabilities in the industry because it expands supply without requiring a new manufacturing cycle or a new corporate fleet refresh.

Consumer segment	Primary concern	Best engagement approach
Backup-device keeper	Loss of emergency option	Explain replacement protection and value decay
Data-sensitive owner	Privacy and memories	Provide transfer support and verified erasure
Value seeker	Offer may be too low	Transparent valuation and timed promotions
Convenience seeker	Return process is effort	Prepaid mail-back, pickup, or retail drop-off
Purpose-driven owner	Unsure of destination	Explain reuse, donation, or responsible recycling

4 | DEVICE ECONOMICS

Device Age, Mix, and Commercial Value

Longer ownership cycles are changing both the timing and profile of secondary supply. Assurant reported average trade-in ages of approximately 3.8 years for iPhones and 4.0 years for Android devices in 2025. Older supply can remain valuable, but economics become more sensitive to battery condition, software support, component availability, and destination market. [8–10]



Source: Assurant mobile trade-in and upgrade reporting. Figures reflect U.S. programs and should not be treated as global averages.

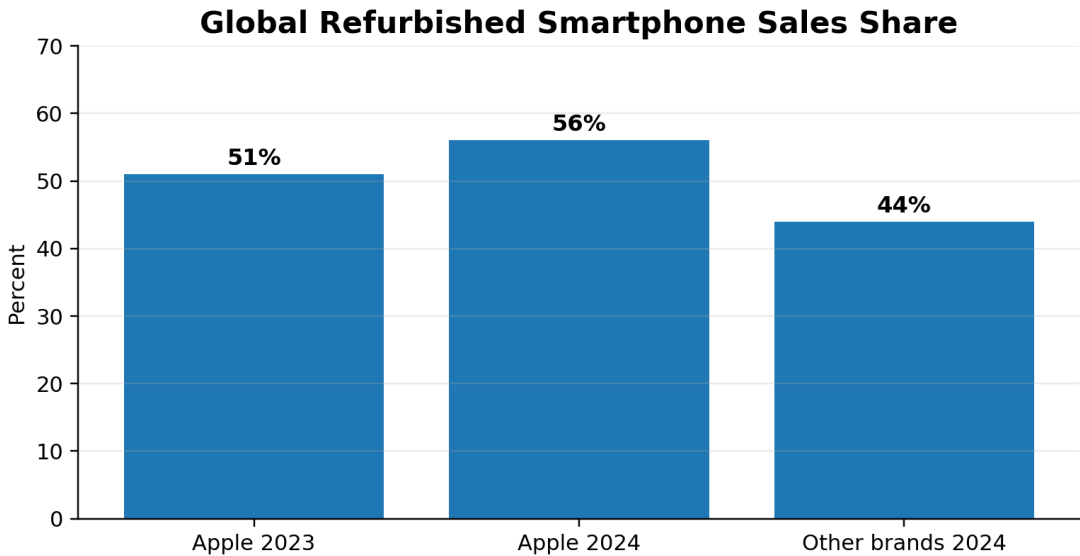
Age changes economics in multiple ways

- Lower market value and reduced room for error
- Higher probability of battery degradation and repair
- Greater exposure to discontinued software support
- Lower parts availability for certain models
- Higher processing cost relative to unit value
- Potentially stronger demand in affordability-driven markets
- Greater importance of accurate market routing

4 | DEVICE ECONOMICS CONTINUED

Premium Concentration Supports Value and Creates Risk

The secondary smartphone market remains heavily influenced by premium devices. Counterpoint estimated that Apple represented about 56% of global refurbished smartphone sales in 2024. Premium concentration supports average selling price and buyer demand, but it can also create supplier, model, and brand dependency. [2,17]



Source: Counterpoint Research, global refurbished smartphone market analysis for 2024.

Commercial quality is not a grading standard

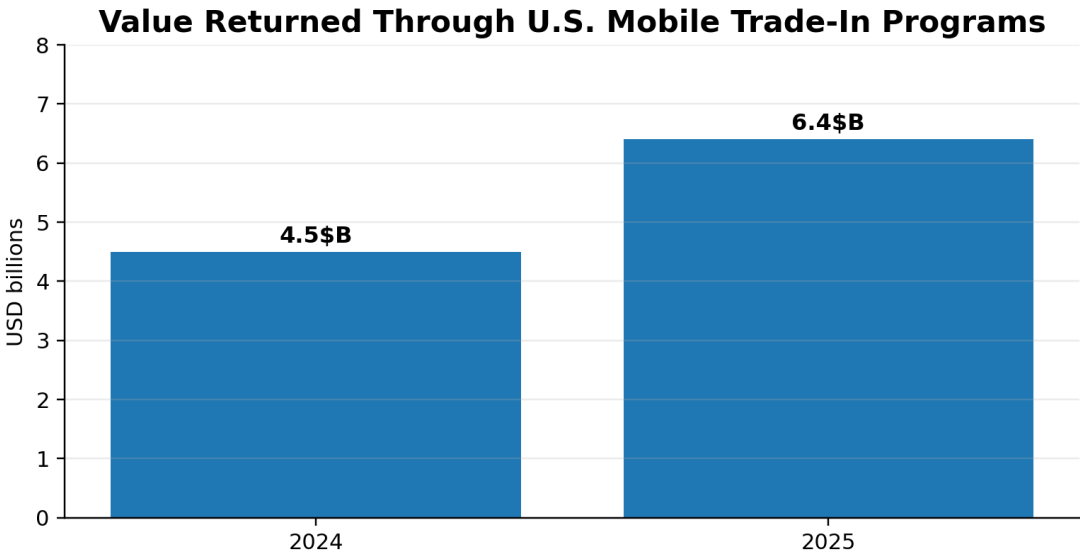
For supply planning, commercial quality means whether a device can be sold profitably into a defined market after all restrictions, processing, repairs, warranty, and return costs are considered. It is an economic and operational decision, not an attempt to duplicate established device-grading standards.

Working hypothesis As device age increases, the winning capability shifts from simply acquiring inventory to routing each model to the market and processing path that creates the highest responsible net return.

5 | TRADE-IN

Trade-In as Supply Infrastructure

Trade-in programs create a structured bridge from first ownership into the secondary market. In the United States, Assurant reported that programs returned a record \$6.4 billion to consumers in 2025, up 42% from 2024. These programs create supply while supporting customer retention and upgrade affordability. [8–10,20]



Source: Assurant. U.S. trade-in values should not be interpreted as a global market total.

A trade-in program performs four functions

- Reduces the net cost of the customer’s next device
- Creates structured supply for the secondary market
- Supports retention and upgrade conversion
- Provides a controlled point for ownership transfer and downstream routing

5 | TRADE-IN CONTINUED

Program Design Determines Realized Supply

Offer value alone does not determine performance. Program design influences acceptance, completion, fraud exposure, device condition, customer effort, collection timing, and downstream economics.

Design element	Supply impact	Leadership question
Offer timing	Captures consumer attention at upgrade	Is the offer presented when the replacement decision is made?
Value certainty	Reduces hesitation and disputes	How often does final value differ from quoted value?
Data support	Increases trust and release rate	Can customers transfer and erase data confidently?
Return convenience	Improves completion	Are retail, mail, pickup, and event options available?
Exception handling	Protects experience and economics	Are locks, damage, and ownership issues resolved quickly?
Downstream routing	Improves realized return	Does each device move to the best responsible market?

Promotional trade-in can distort supply economics

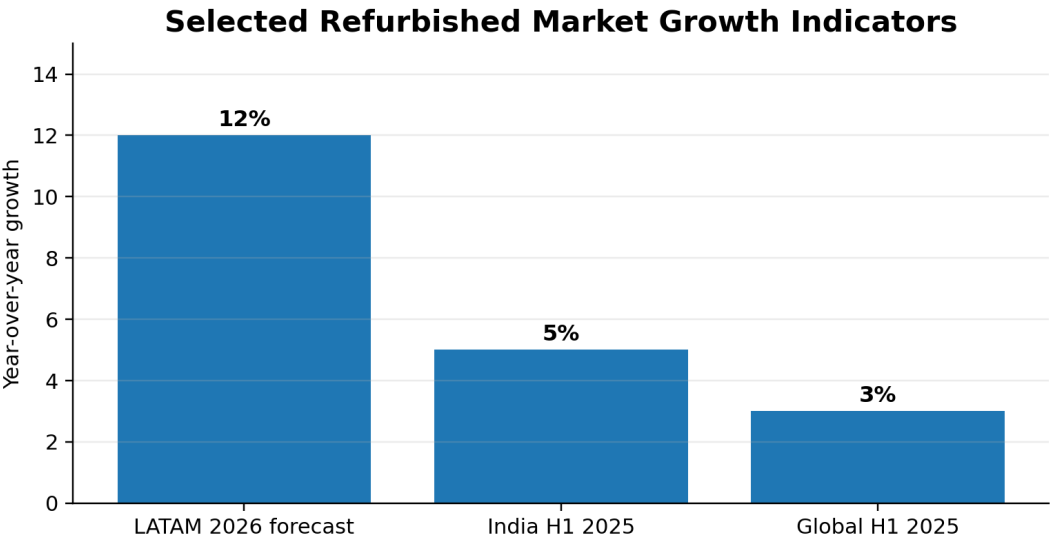
Aggressive promotional offers may prioritize volume or customer retention rather than device recovery value. Secondary-market operators should understand who funds the incentive, how valuation adjustments are managed, and how program economics change when promotional support is reduced.

Working hypothesis Trade-in will remain the most visible structured supply channel, but dormant-device activation and direct acquisition may create the largest incremental growth because they reach beyond the normal upgrade event.

6 | GLOBAL MARKETS

Regional Supply and Demand Imbalances

Supply originates where devices are purchased, upgraded, and replaced. Demand may be strongest somewhere else. Differences in income, brand preference, network compatibility, regulation, taxes, financing, and import policy create persistent regional imbalances.



Selected directional growth indicators from public market research. Percentages cover different periods and are not directly comparable market sizes.

A global routing principle

A device is not inherently high-value or low-value. Its commercial value depends on the market, customer need, compatibility, support status, logistics, compliance, and total landed cost. The strongest operators maintain multiple responsible routes rather than forcing every device into the same channel.

6 | GLOBAL MARKETS CONTINUED

Regional Opportunity and Constraints

North America

North America has mature carrier and retailer trade-in programs, high premium-device penetration, and significant promotion-driven upgrade volume. It is an important source of recent models, but competition for supply and promotional volatility can compress margins.

Europe

Europe combines organized consumer channels, repair and reuse policy, and cross-border demand. Country-level differences in taxation, warranty, consumer law, and take-back systems require market-specific execution.

Asia-Pacific

Asia-Pacific includes mature premium markets, major manufacturing and processing centers, and large affordability-driven markets. Success depends on local brand preference, network compatibility, import rules, and the ability to route devices across very different price points.

Latin America, Middle East, and Africa

These regions can offer strong demand for capable, affordable smartphones. Opportunity is shaped by currency, import policy, logistics, payment risk, local support, and the availability of compliant channels.

Region	Supply advantage	Primary constraint
North America	Recent premium devices and structured trade-in	Competition and promotional dependence
Europe	Organized channels and policy support for longer life	Country-level legal and tax complexity
Asia-Pacific	Scale and diverse supply-demand profiles	Market fragmentation and import controls
Latin America	Affordability-led demand	Currency, tariffs, logistics, and financing
Middle East and Africa	Demand for capable lower-cost devices	Documentation, route-to-market, and payment risk

7 | CROSS-BORDER SUPPLY

Cross-Border Supply and Regulatory Risk

International trade is essential because supply and demand do not align naturally. It also creates exposure to customs, sanctions, tariffs, taxes, consumer law, environmental rules, and the distinction between products intended for reuse and electronic waste.

Documentation is a commercial capability

Accurate invoices, device lists, identifiers, ownership records, testing information, transport documents, and destination evidence can determine whether a shipment moves efficiently or becomes delayed, rejected, fined, or seized. Documentation should be built into the operating process rather than assembled after a transaction closes.

Risk areas

- Accurate product classification and valuation
- Sanctions and restricted-party screening
- Country-of-origin and tariff treatment
- Network and market compatibility
- Evidence that products are intended for legitimate reuse
- Battery transport and dangerous-goods requirements
- Consumer warranty and return obligations
- Downstream responsibility when products cannot be reused

Working hypothesis Global supply growth will favor operators that treat compliance, documentation, and destination-market knowledge as part of the value proposition rather than as administrative overhead.

8 | FINANCIAL DISCIPLINE

Inventory Economics and Cash Conversion

Supply creates value only when it converts into collected cash. A company can acquire large volumes and report attractive gross margin while losing money through aging, freight, rework, returns, warranty, fraud, financing cost, and slow collections.

The realized acquisition cost

The true cost of a device is not the purchase price. It includes inbound freight, shortages, reconciliation, locks, fraud losses, testing, labor, parts, packaging, outbound freight, marketplace fees, warranty, returns, taxes, and the cost of capital during the time inventory is held.

Metric	What it reveals	Management use
Collection conversion	Share of expected devices that arrive	Evaluate program effectiveness
Reconciliation variance	Difference between expected and received	Identify supplier and logistics leakage
Saleable yield	Share available for productive sale	Measure source quality and assumptions
Processing cycle time	Days from receipt to available inventory	Identify value-destroying delay
Inventory aging	Units and value by aging bucket	Trigger price, route, or purchase changes
Contribution margin	Net return after variable costs	Compare sources and channels
Cash conversion	Days from payment to collected customer cash	Align purchases with working capital

Leadership question Which source produces the strongest cash return after every cost and delay is included—not simply the highest unit volume or apparent gross margin?

9 | TECHNOLOGY

Technology and Operating Capability

Technology can improve supply forecasting, collection conversion, fraud prevention, device identification, workflow visibility, pricing, inventory routing, and customer communication. It does not replace clear ownership or disciplined processes.

High-value applications

- Dynamic trade-in valuation based on model, age, market, and demand
- Customer reminders and personalized return offers
- Fraud detection using account, identity, device, and transaction signals
- Inbound appointment, shipping, and chain-of-custody management
- Automated device identification and inventory reconciliation
- Workflow routing based on commercial outcome
- Demand forecasting and market allocation
- Source-level profitability and aging dashboards

Data quality is the limiting factor

Artificial intelligence and automation amplify the quality of the underlying data. Inconsistent identifiers, incomplete receiving records, unclear ownership, and disconnected systems produce faster confusion rather than better decisions. Companies should define a common device record across purchasing, operations, finance, and sales.

Digital product passports may influence future supply

Emerging digital product passport approaches could improve access to product identity, support, repair, materials, and lifecycle information. If designed fairly, they may reduce uncertainty and improve routing. If access is restricted, expensive, or controlled by a narrow group, they may create new barriers for legitimate secondary-market businesses. GMA will address this topic separately in greater depth.

10 | RESILIENCE

Building a Resilient Supply Portfolio

A resilient supply strategy can absorb changes in launches, consumer behavior, trade policy, model demand, pricing, and individual partners. It does not eliminate volatility. It prevents one change from destabilizing the entire business.

Portfolio design principles

- Diversify by source without losing control
- Balance premium and affordability-driven product segments
- Limit concentration by supplier, buyer, model, brand, and country
- Match purchase commitments to working-capital capacity
- Maintain multiple responsible downstream options
- Use clear stop-loss rules for aging and deteriorating economics
- Review supply strategy against market demand every month

Supplier relationship management

Reliable supply relationships are built through accurate forecasting, fair reconciliation, timely payment, transparent dispute resolution, data sharing, and consistent performance. A supplier may accept a lower headline price in exchange for lower risk, faster settlement, better reporting, and predictable execution.

Working hypothesis The most resilient sourcing advantage will come from superior execution and trust, not simply from paying the highest price for inventory.

10 | RESILIENCE CONTINUED

Supply Maturity Model

Organizations can use the following model to assess whether supply is managed reactively or as an integrated strategic capability. Progress depends on stronger data, clearer ownership, repeatable controls, and alignment between sourcing and downstream demand.

Level	Operating characteristics	Priority to advance
1. Reactive	Opportunistic buying, limited visibility, decisions driven by immediate availability	Map flows, calculate true cost, establish controls
2. Controlled	Approved sources, reconciliation, defined receiving and lock checks	Measure conversion, yield, cycle time, and aging
3. Integrated	Sourcing aligned with sales demand, finance, operations, and compliance	Connect systems and create source-level profitability
4. Predictive	Forecasting, dynamic offers, scenario planning, diversified routes	Improve data quality and decision automation
5. Resilient	Balanced portfolio, rapid rerouting, disciplined capital allocation, transparent outcomes	Continuously test concentration and assumptions

Scenario planning

Supply plans should be tested against a small number of plausible disruptions rather than one expected forecast. Each scenario should identify financial exposure, operational response, decision owner, and trigger for action.

Scenario	Likely supply effect	Prepared response
Major launch accelerates upgrades	Volume increases; prices may fall quickly	Prepare capacity, buyer commitments, and rapid routing
Ownership cycles lengthen	Supply slows and average age rises	Increase dormant-device activation and diversify sources
Tariffs increase new-phone prices	Used demand may rise; imports may change	Reprice markets and reassess cross-border exposure
Premium model shortage	ASP and competition rise	Protect margins and broaden product/customer mix
Buyer demand weakens	Inventory ages and cash slows	Reduce commitments and redirect supply

11 | GMA ROLE

How GMA Can Support the Conversation

GMA can help ensure the global used mobile ecosystem is represented in discussions about device supply, collection, trade, technology, and policy. The association's specific programs and deliverables will be determined through leadership approval, member input, available resources, and the priorities established as GMA develops.

Potential areas of support

- Monitor market, policy, and technology developments that may affect device supply and share relevant information with members.
- Use research, webinars, committee discussions, and member communication to help companies understand emerging supply challenges and opportunities.
- Create opportunities for members to exchange practical perspectives on global market conditions, logistics, compliance, technology, and business performance.
- Gather member feedback so GMA can better understand where the ecosystem needs education, resources, industry connection, or representation.
- Represent approved member priorities in appropriate industry conversations when GMA leadership determines that participation would create value.

Guiding principle

GMA should not commit publicly to programs, campaigns, reports, toolkits, advocacy positions, or recurring events until each initiative has been reviewed, approved, and supported with the resources required to deliver it well. The association's role is to remain informed, listen to members, identify meaningful gaps, and act where it can provide credible value without duplicating the work of established organizations.

ACTION FRAMEWORK

Recommended Actions

Next 30 days

- Map every current source and the full device flow from quote to collected cash.
- Calculate realized acquisition cost and saleable yield by source.
- Identify supplier, buyer, brand, model, and country concentration.
- Review inventory aging and create action rules for every aging bucket.
- Document the top five reasons expected supply fails to arrive or become saleable.
- Confirm data, ownership, lock, and fraud controls at acquisition.

Next 90 days

- Create a balanced sourcing portfolio with clear limits and ownership.
- Build dashboards covering conversion, yield, cycle time, aging, margin, and cash.
- Redesign return communications around value, data protection, and convenience.
- Establish approved market routes for different age and value segments.
- Test one new collection channel with defined economics and success measures.
- Review cross-border documentation and destination risk with qualified advisors.

Next 12 months

- Expand collection in underserved markets and customer segments.
- Connect acquisition, receiving, processing, finance, and sales data.
- Build supplier partnerships based on execution, not only price.
- Develop scenario plans for launches, tariffs, supply shocks, and buyer weakness.
- Participate in GMA supply research, regional roundtables, and member education.
- Publish measurable progress on reuse, collection, and responsible downstream outcomes.

METHODOLOGY

Research Methodology and Limitations

This report synthesizes publicly available market forecasts, consumer research, trade-in program data, regulatory information, and GMA analysis available through July 2026. Sources were selected for credibility, relevance, and direct connection to used-smartphone supply.

Research findings were compared across sources to separate market direction from source-specific definitions. Where the paper extends beyond an explicit source statement, the conclusion is presented as GMA analysis or as a working hypothesis.

Source categories

- IDC and Counterpoint Research market forecasts and analysis.
- GSMA global circularity and consumer research.
- Assurant trade-in and device-age reporting.
- Eurostat consumer disposition statistics.
- World Bank research on device affordability.
- Public information on tariffs, regulation, and cross-border trade.

Limitations

- Market sources use different definitions of used, refurbished, pre-owned, and secondary devices.
- Some detailed datasets are proprietary; this report uses publicly available findings.
- U.S. trade-in values should not be interpreted as global totals.
- Regional growth indicators cover different periods and are not directly comparable market sizes.
- Dormant-device estimates are ranges rather than audited inventory counts.
- Supply economics differ materially by company, channel, country, and product mix.

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Citation Note

Statistics and market findings should be interpreted within the definitions and geographic scope of the cited source. Public estimates can change as market data is revised.



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