

# The Connector Industry Roadmap: 2011-2021

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## Abstracts

### **In-depth Analysis and Historical Perspectives for Forecasts and Planning**

The latest Bishop & Associates report, “The Connector Technology Roadmap 2011-2021,” examines the electronics industry and connectors over the past decade, and forecasts the decade to come. This seven-chapter, 209-page report provides electronics industry insiders with valuable insights and information.

The detailed study includes 146 charts and tables, and many photos and illustrations, giving readers a multi-dimensional look into industry trends, technology strategies, and industrial competitiveness in the electronic component and connector industry. The report also analyzes major elements of the electronics industry that parallel, intersect, and influence connectors.

As the global economy has come to define the industry, the report includes a look into the competitive position and strategies affecting various regions, including shifting priorities for North America, Europe, Japan, China, and Asia-Pacific. A discussion of this global dynamic includes the possibility of future “in-sourcing” as some manufacturing returns to North America.

The study also looks at the connector industry’s markets and technology trends, and details over 20 major product roadmaps, with technical parameters, forecasts, encroachment, and possible roadblocks over the next decade. U.S. Census Bureau data is compiled on U.S. shipments in 30 multi-billion dollar equipment markets, including automotive, computer and electronic products, military-aerospace, semiconductors, and many others, charted from 1992-2011, with trend line analysis to 2021.

Also included is a discussion of semiconductor technology, electronics packaging, and

printed circuit technology, and the potential for slowing of Moore's Law — a critical driver for connector technology and demand.

Reflecting upon the deep 2008-2009 recession, the report discusses how the industry will move forward, forecasts key markets, and gives long-range projections on both connector and equipment markets. Many forecasters think the recovery will continue to be slow and painful, or backslide into another recession. Others see the potential for renewed growth as governments grapple, perhaps successfully, with tax, energy, sovereign debt, and environmental policies.

The industry did see a substantial rebound in 2010 — up +25% in some markets, amplified by inventory replenishment, and a bit more in 2011. But 2012 may be slower. Current factors include the European debt crisis and its possibly inadequate short-term fix, and slower growth in China. Uncertainty remains due to the unprecedented situation we have faced and the timing of future recessions, which historically have occurred every 4-6 years. Thus, the connector industry forecast for 2011-2021 is conservative, in single digits, accounting for future downturns, maturing markets such as telecom and computer, higher levels of circuit integration fueled by SiP and SoC, and the potential for continued slower consumer spending.

**Key elements of this report include:**

Detailed historical perspective

Current situation

Detailed statistics on U.S. industry shipments by 30 equipment market segments

Analysis of connector market by company size and by Top 10, 50, and 100 suppliers

In-depth analysis of regional factors

Connector technology trends, enabling technologies, and manufacturing

Over 20 connector product technology roadmaps

Analysis of regional design and corporate leadership in an attempt to re-analyze geographic boundaries

The purpose of this report is to provide massive data, and at times controversial positions, to give interested parties a forecasting tool and impetus to undertake advanced planning, rather than submit to a short-term, “fire drill” mentality. Some say that long-range forecasts are difficult and inaccurate. Others believe they enable company planning, and inspire dialog on important, uncertain issues. At Bishop & Associates, we gather the data and help make it speak to your company’s future.

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