

The World Distribution Market for Connectors

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Abstracts

Bishop and Associates has just released a new nine-chapter research report analyzing the World Distribution Market for Connectors. This 329-page report provides a comprehensive analysis of the distribution market for connectors through both the POP (connector manufacturers' sales to distributors) and POS (distributor sales to OEMs and CEMs) channels. POP and POS sales are provided for the years 2004 through 2010, and a 2014 forecast.

Distribution accounts for a large share of the connector market.

The world connector industry will achieve sales of \$42,956 million in 2010, an increase of +24.9 percent over 2009. Distribution will account for 21.8 percent of the world market this year. In regions with well-established distributor presence and business models such as Europe and North America, distribution accounts for 31.2 percent and 32.5 percent of total sales respectively.

Distribution's share of the connector market has increased steadily from 2004, when it accounted for only 19.1 percent of world connector sales. In our opinion, distribution's share of the total market will continue to increase as customers in fast growing economies, such as China and India, embrace the value proposition that distribution provides.

HIGHLIGHTS

Connector manufacturers' sales to distributors have grown faster than the overall market during the five-year period 2004 – 2009 in all six regions of the world. Distributor sales to end customers also grew faster than the overall market over the same period.

The impact of distribution on the overall connector market varies widely by region of the

world. The region where POP sales represented the largest percentage of total connector sales was Europe with more than 30 percent going through the distribution channel in 2009. POP, however, will account for less than 10 percent of overall connector sales in Japan in 2009.

End-use equipment sectors also vary widely among regions. In 2009, the Military/Aerospace market sector generated the highest percentage of POS sales in North America and Europe, but the lowest percentage of POS sales in each of the other regions. Computers and Peripherals generated the most POS sales in China and Asia Pacific, but the least in Europe.

Sales by connector type, however, are fairly consistent from region to region. PCB connectors represented the highest percentage of total POP in every region in 2009, while rectangular/IO connectors generated the second highest sales level in all but one region.

From 2008 to 2009, POP sales fell at a historically high percentage. It is anticipated that by the end of 2010, 88 percent of that loss will be recovered, placing POP sales 3.6 percent below 2008 levels and approximately at the same level as 2007.

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2009 ROW Distributor POP Connector Market - Product Line/ End-Use Sector Matrix

2010F ROW Distributor POP Connector Market - Product Line/ End-Use Sector Matrix

2014F ROW Distributor POP Connector Market - Product Line / End-Use Sector Matrix

ROW Distributor POS Market Year-to-Year Growth 2004-2009

POS End-Use Equipment Sectors

ROW Distributor POS Connector Market by End-Use Equipment Sector

2009 ROW Dist. POS Connector Market - Top Five Equip Sectors - Percent of Total Market

ROW Distributor POS Connector Market by Equipment Sector 2004 - 2009

ROW Dist. POS Connector Market by Equip Sector 2014 Forecast & Five-Year CAGR 2009/2014 Connector Five-Year CAGR - Ranked by Percent Growth

ROW Dist. POS Connector Market by End-Use Equip - Percent of Total by Year & Equip Sector

ROW Dist. POS Connector Market - Top Five End-Use Equip Sectors - Percent of Total Sales

POS Product Categories

ROW Distributor POS Connector Market by Product Category

2009 ROW Dist. POS Connector Market - Top Five Prod Categories - Percent of Total Market

ROW Distributor POS Connector Market by Product Category - 2004 - 2009

ROW Dist. POS Connector Market by Product Category - 2014 Forecast & Five-Year CAGR

2009/2014 Connector Five-Year CAGR - Ranked by Percent Growth

ROW Dist. POS Connector Market by Prod Category-Percent of Total by Year & Prod Category

ROW Dist. POS Connector Market - Top Five Product Categories - Percent of Total Sales

2004 ROW Distributor POS Connector Market - Product Line / End-Use Sector Matrix

2005 ROW Distributor POS Connector Market - Product Line / End-Use Sector Matrix

2006 ROW Distributor POS Connector Market - Product Line / End-Use Sector Matrix

2007 ROW Distributor POS Connector Market - Product Line / End-Use Sector Matrix

2008 ROW Distributor POS Connector Market - Product Line / End-Use Sector Matrix

2009 ROW Distributor POS Connector Market - Product Line/ End-Use Sector Matrix

2010F ROW Distributor POS Connector Market - Product Line/ End-Use Sector Matrix

2014F ROW Distributor POS Connector Market - Product Line / End-Use Sector Matrix

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