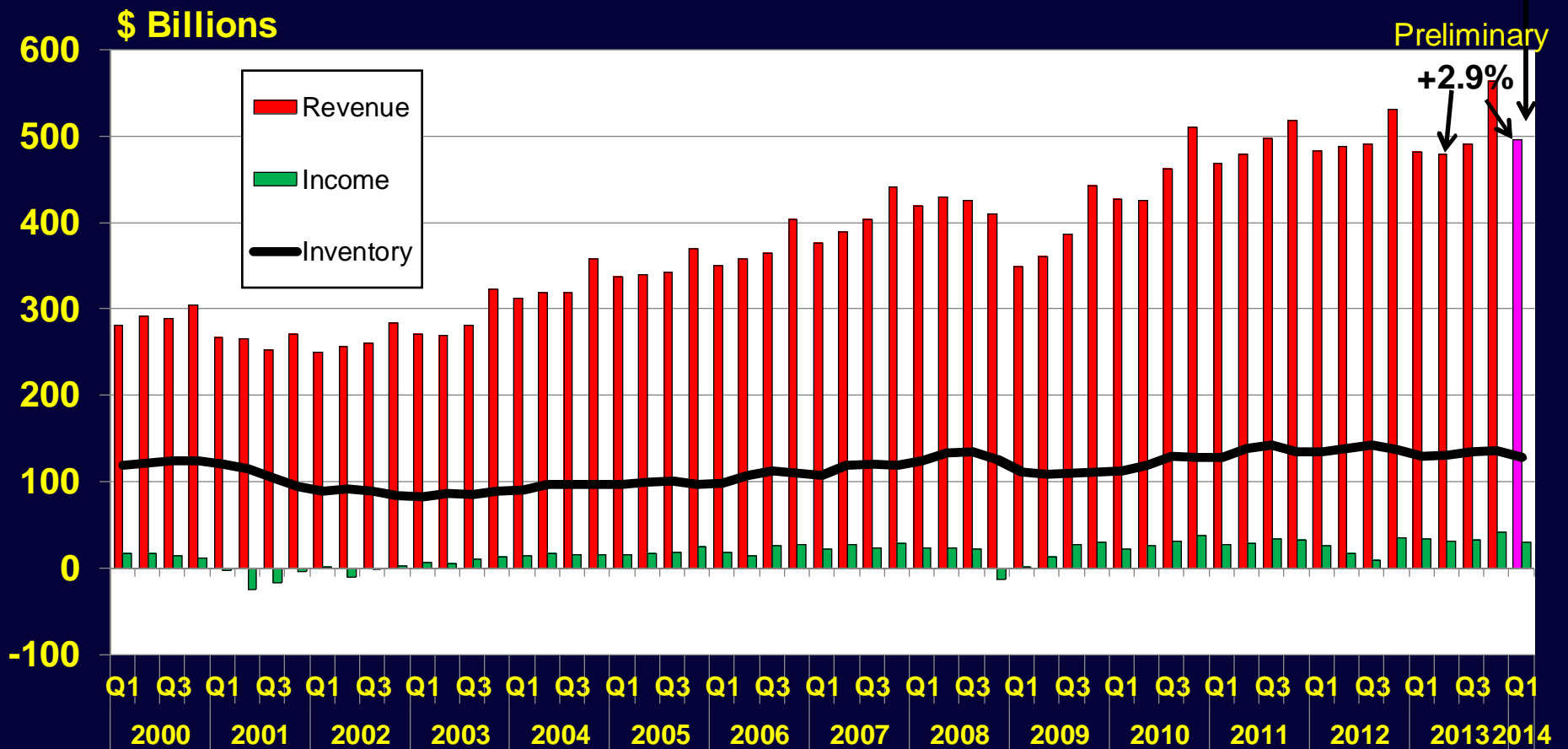


Chart 1

# Electronic Equipment Suppliers Composite of 141 Public Companies

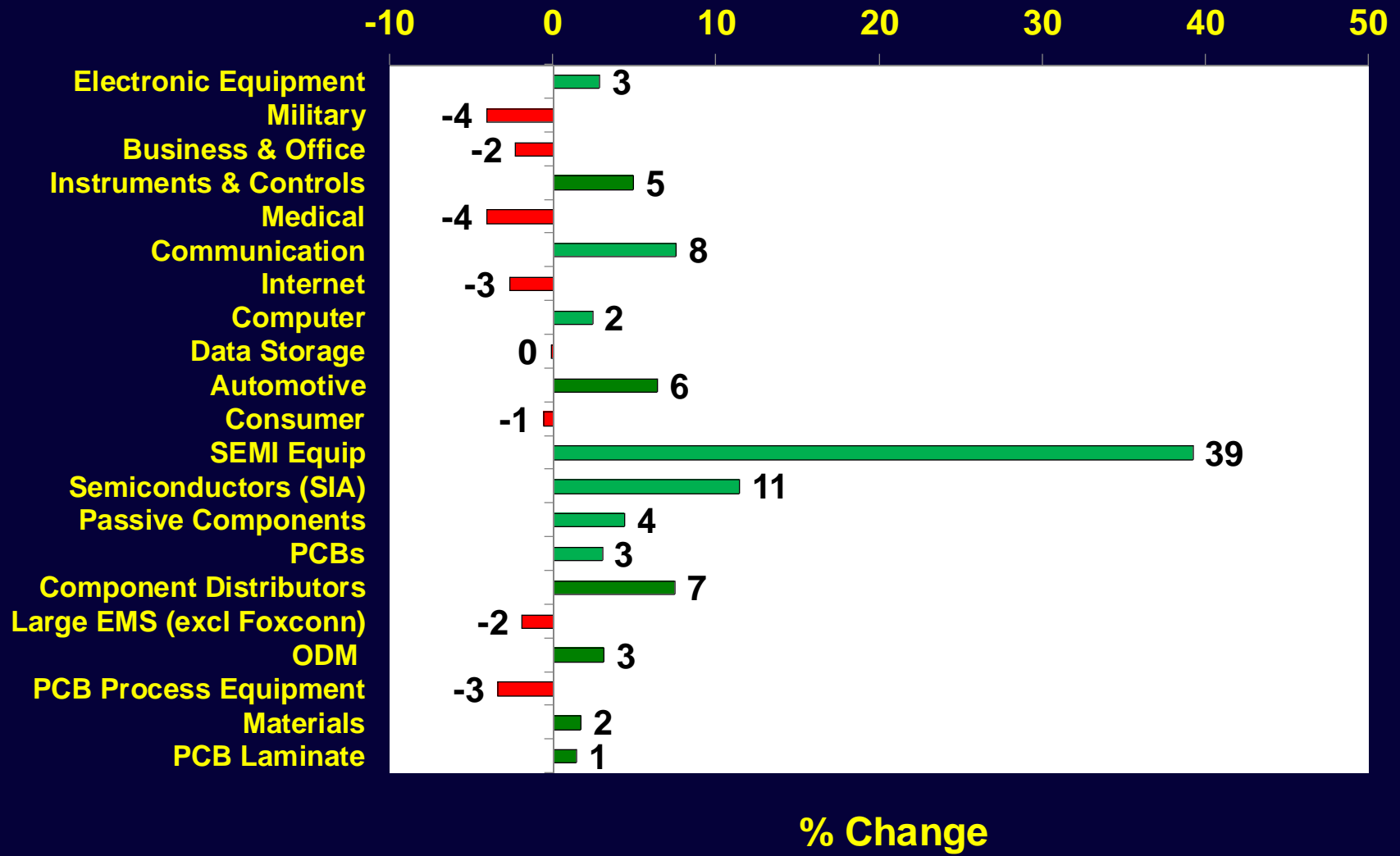
## Revenue, Net Income & Inventory



Computer 13, Internet 9, Storage 10, Communication 20, SEMI 20, Medical 23, Instruments 11, Military 6, Business & Office 3, Consumer 13, Automotive 11

Chart 2

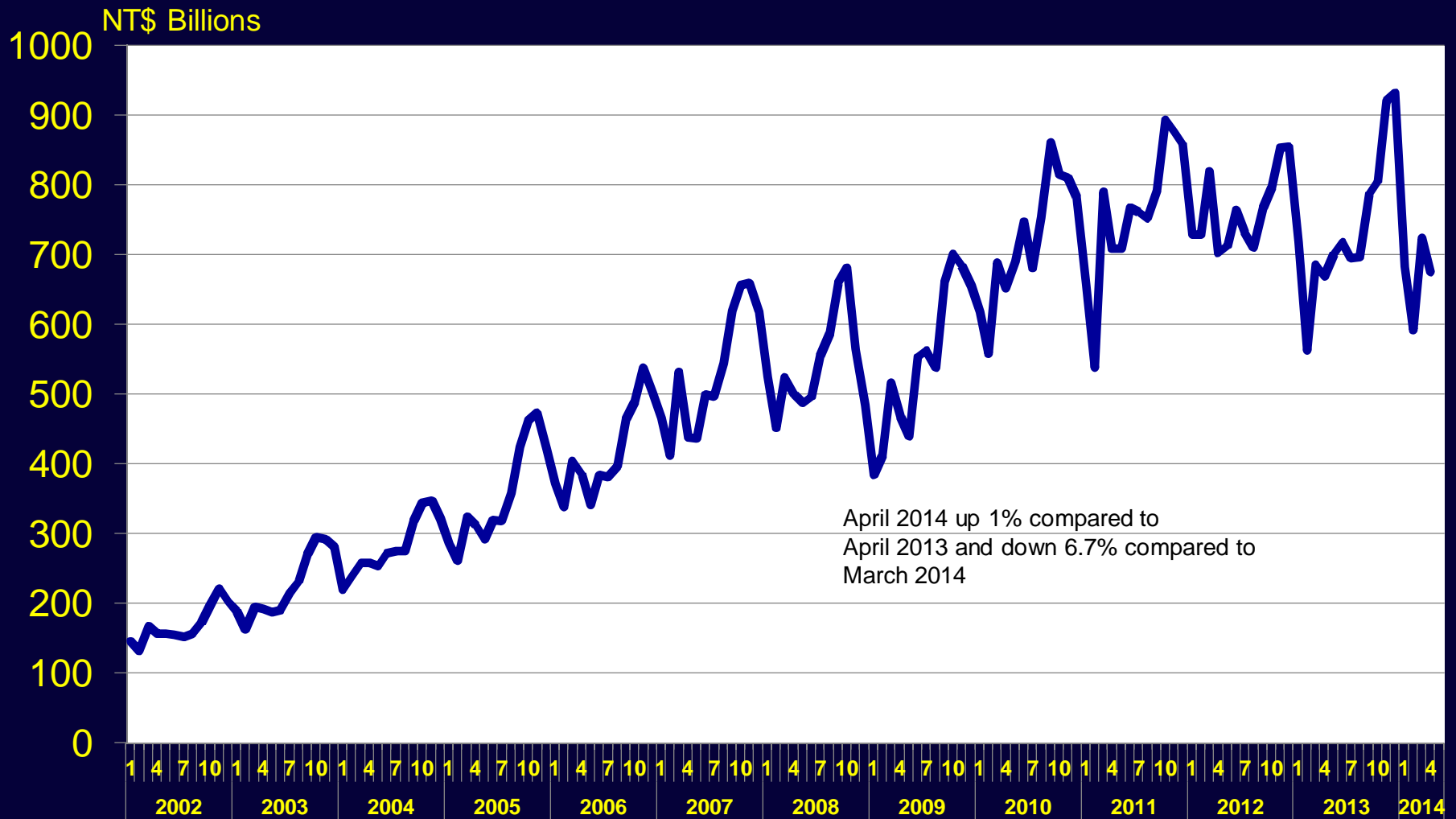
# Global Electronic Supply Chain Growth 1Q'14 vs. 1Q'13 (preliminary)



US\$ equivalent at fluctuating exchange; based upon industry composites including acquisitions

Chart 3

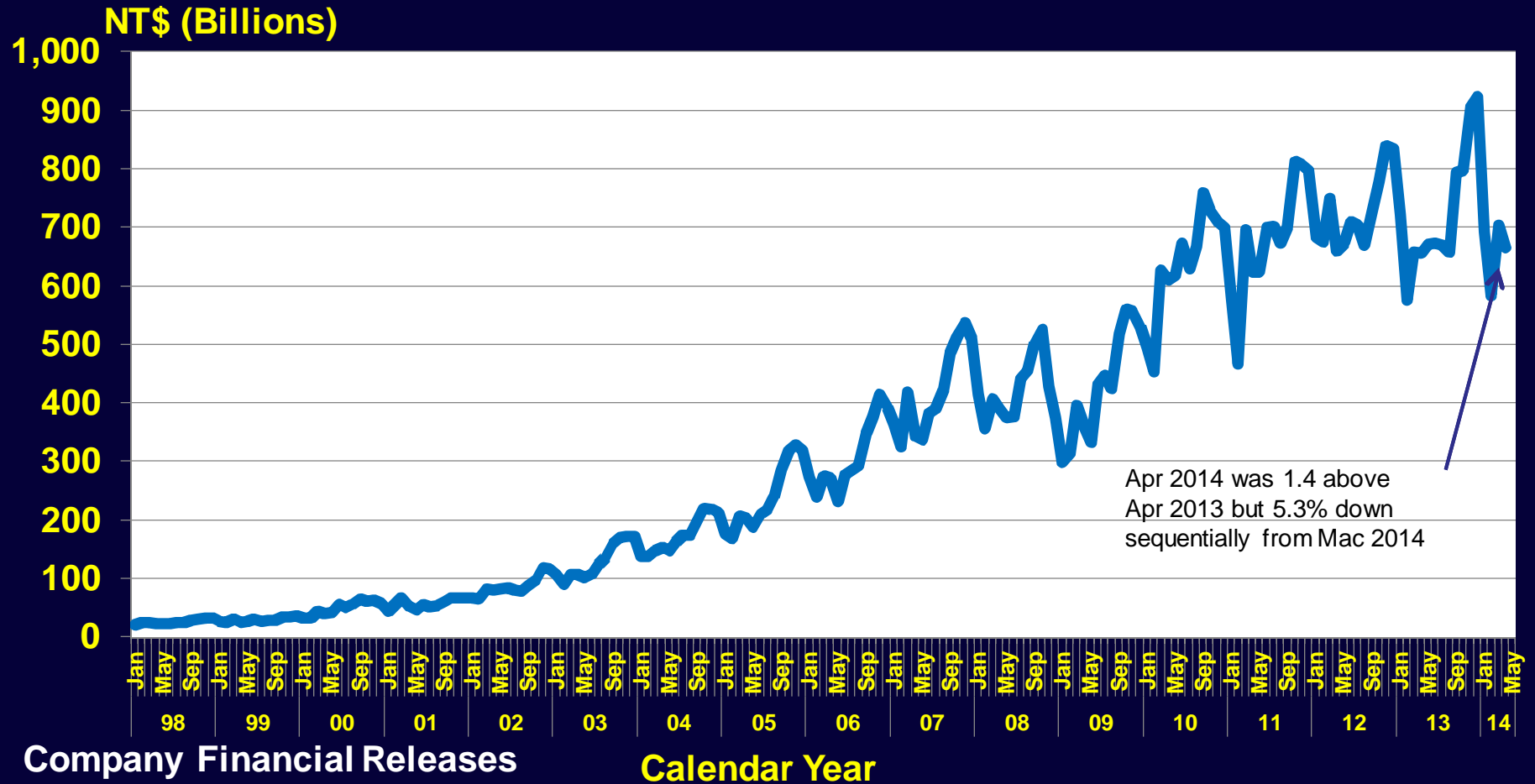
# Taiwan/China Electronic Equipment Producers Composite of 101 Manufacturers Consolidated Revenue



Taiwan listed companies, often with significant manufacturing in China

Chart 4

# Taiwan ODM Companies Composite Sales of 11 Large Manufacturers



Asustek Computer, Chei Mei, Compal Electronics, Foxconn, Chimei Innolux, Inventec, Inventec Appliance, Lite On Technology, Mitac International, Pegatron, Quanta Computer, Wistron, Chei Mei Display replacing Chei Mei & Innolux Display 3/10 & later

Chart 5

# Taiwan Solar/Photovoltaic Panel Companies Composite of 17 Manufacturers

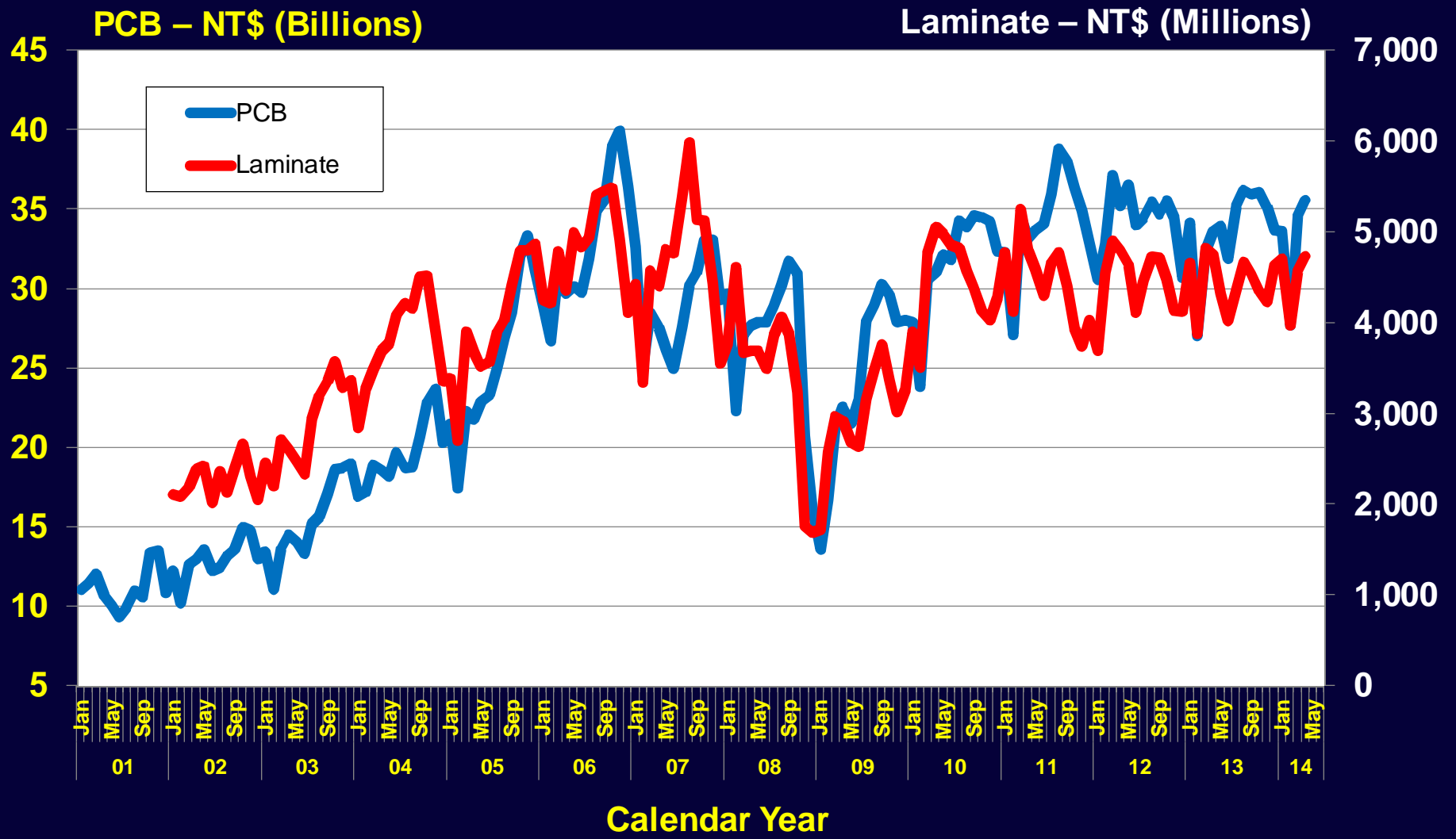


Big Sun Energy Technology, Daxon, DelSolar, e\_TON Solar Tec, Eversol, Gintech, Green Energy Technology (GET), Ligitek, Motech, Neo Solar Power, Phoenixtec Power Co (PPC), Precision Silicon, Sino-American Silicon Products, Sonartech, Sysgration, Tyntek, Wafer Works

Chart 6

# Taiwan Shipments

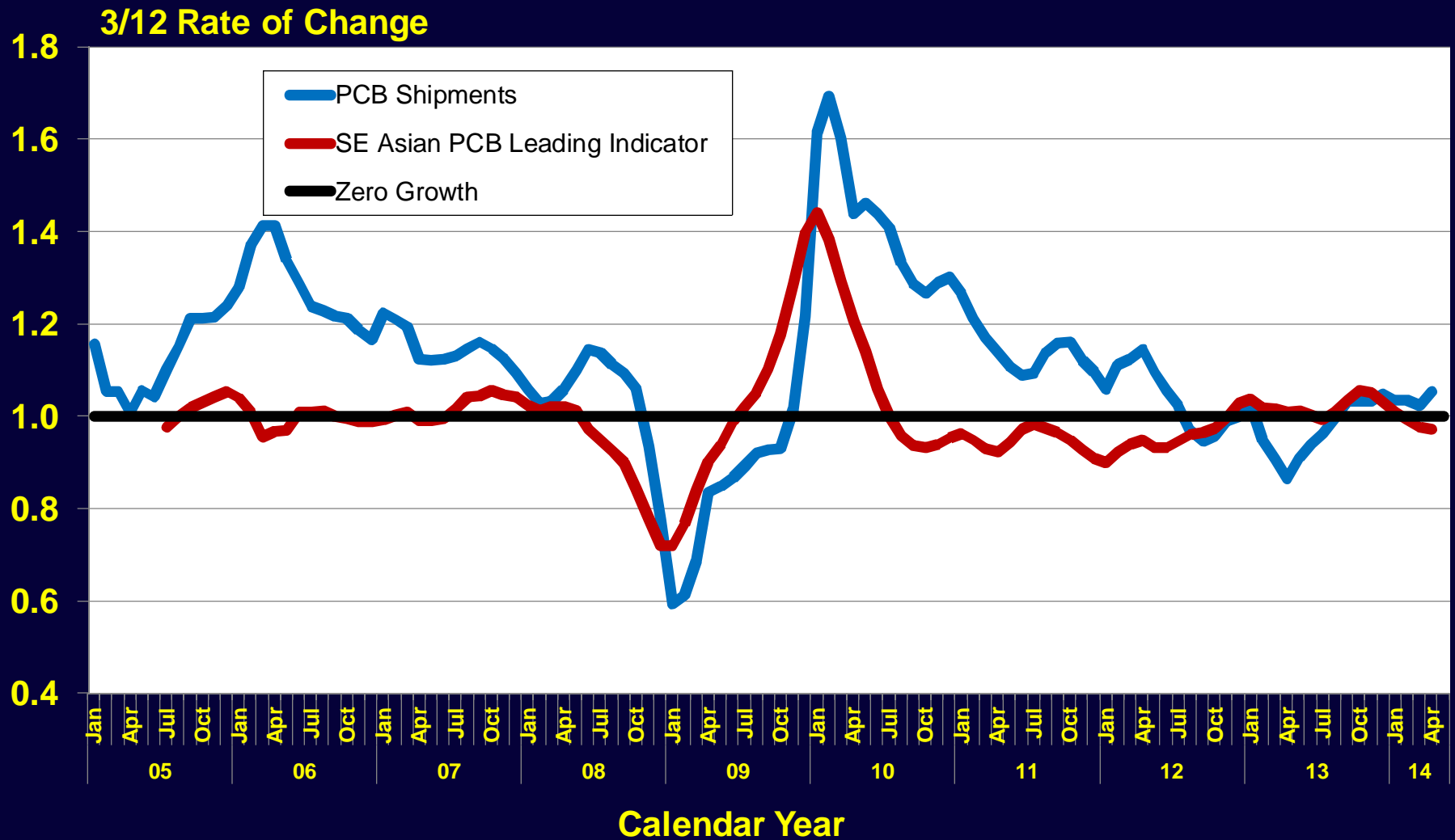
## 42 Rigid PCB & 8 Laminate Manufacturers



Company Financial Releases

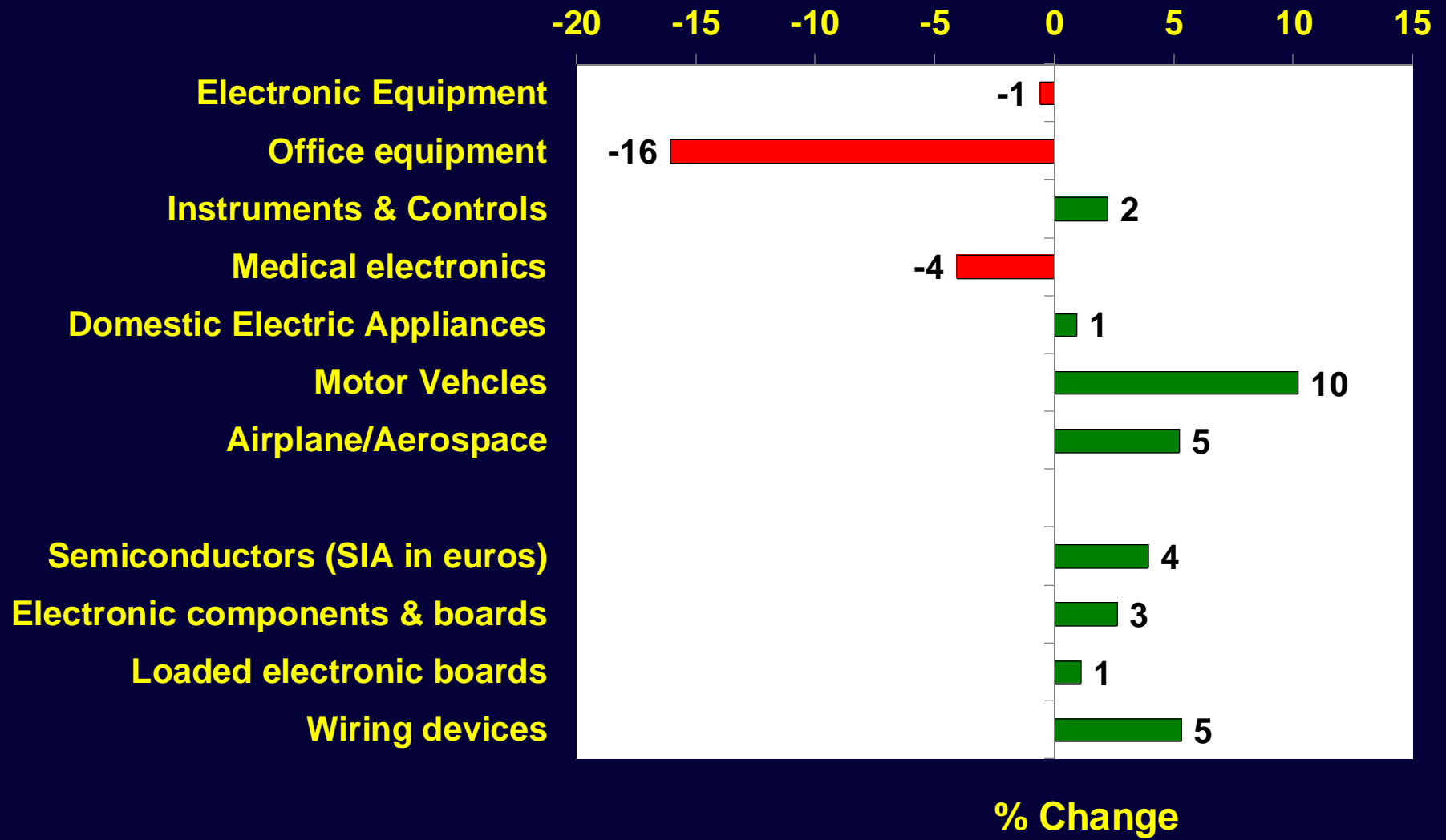
Chart 7

# SE Asia CCG PCB Leading Indicator vs. China/Taiwan PCB Shipments @ Fluctuating Exchange



Source: Custer Consulting Group

# Chart 8 **European Electronic Supply Chain Growth** **1Q'14 vs 1Q'13**



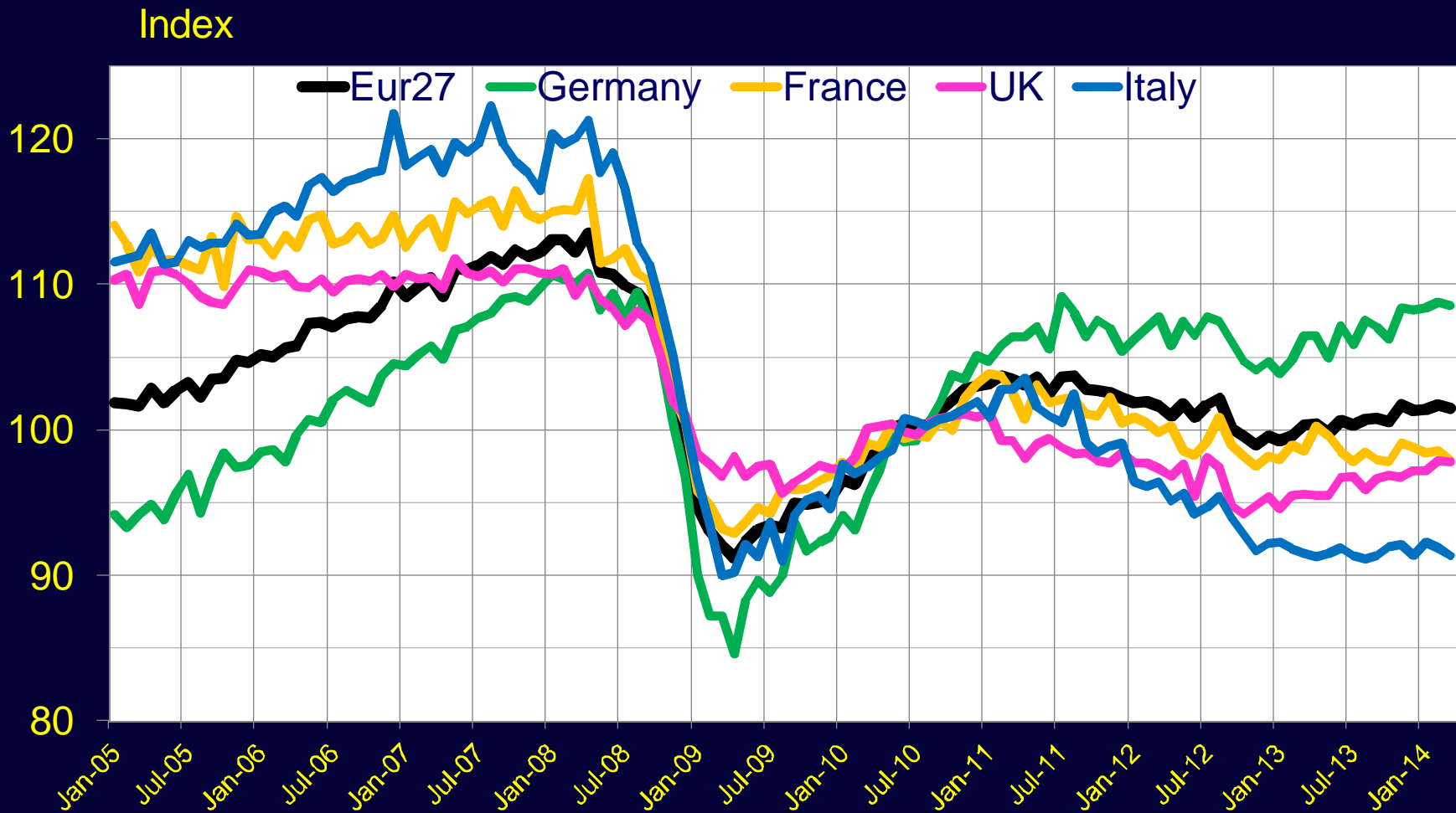
Euro denominated growth rates; Eurostat, SIA & Custer Consulting Group



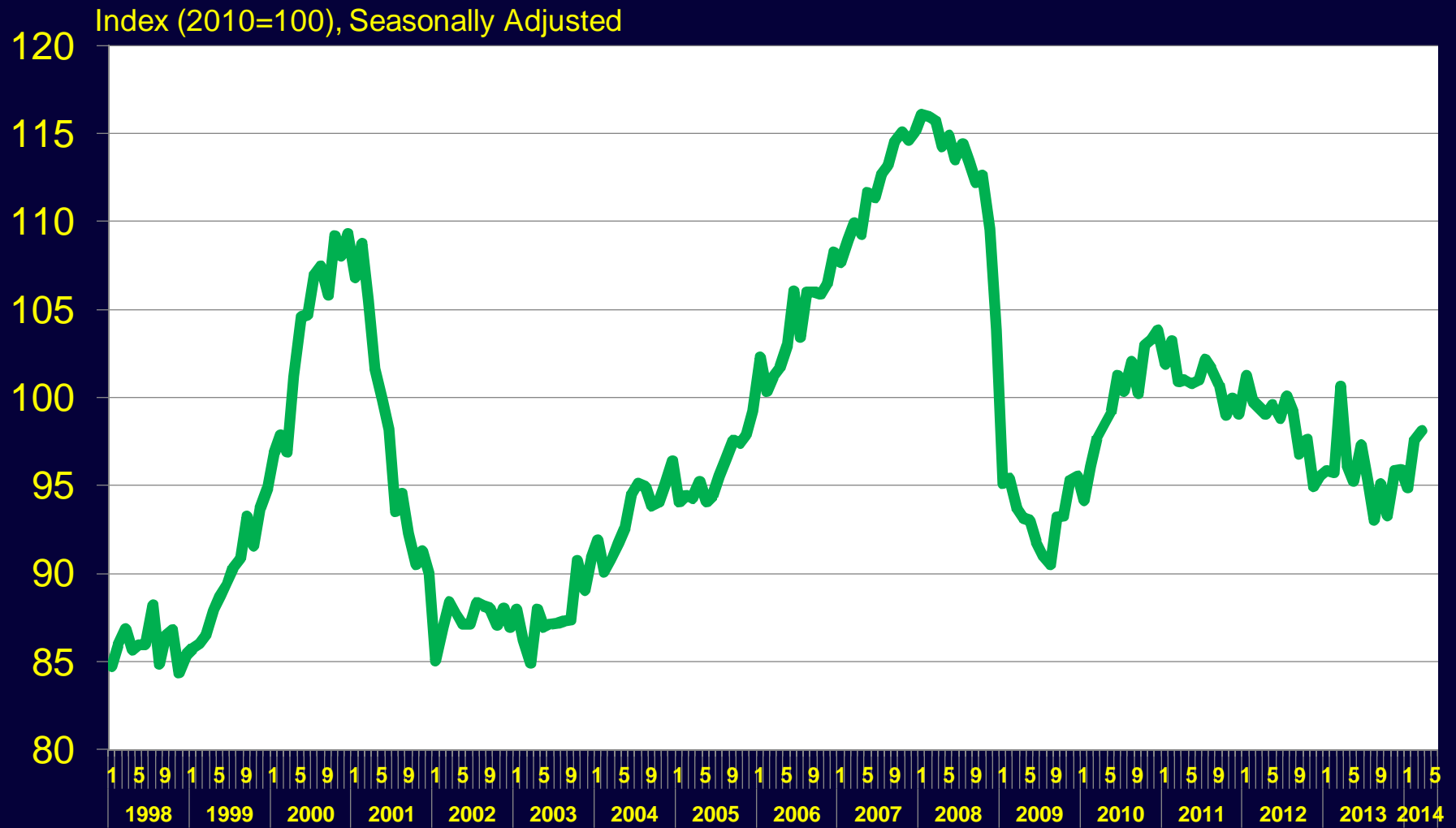
Chart 9

# Industrial Production - Europe

Index (2010 Avg. Month = 100, Seasonally Adjusted)



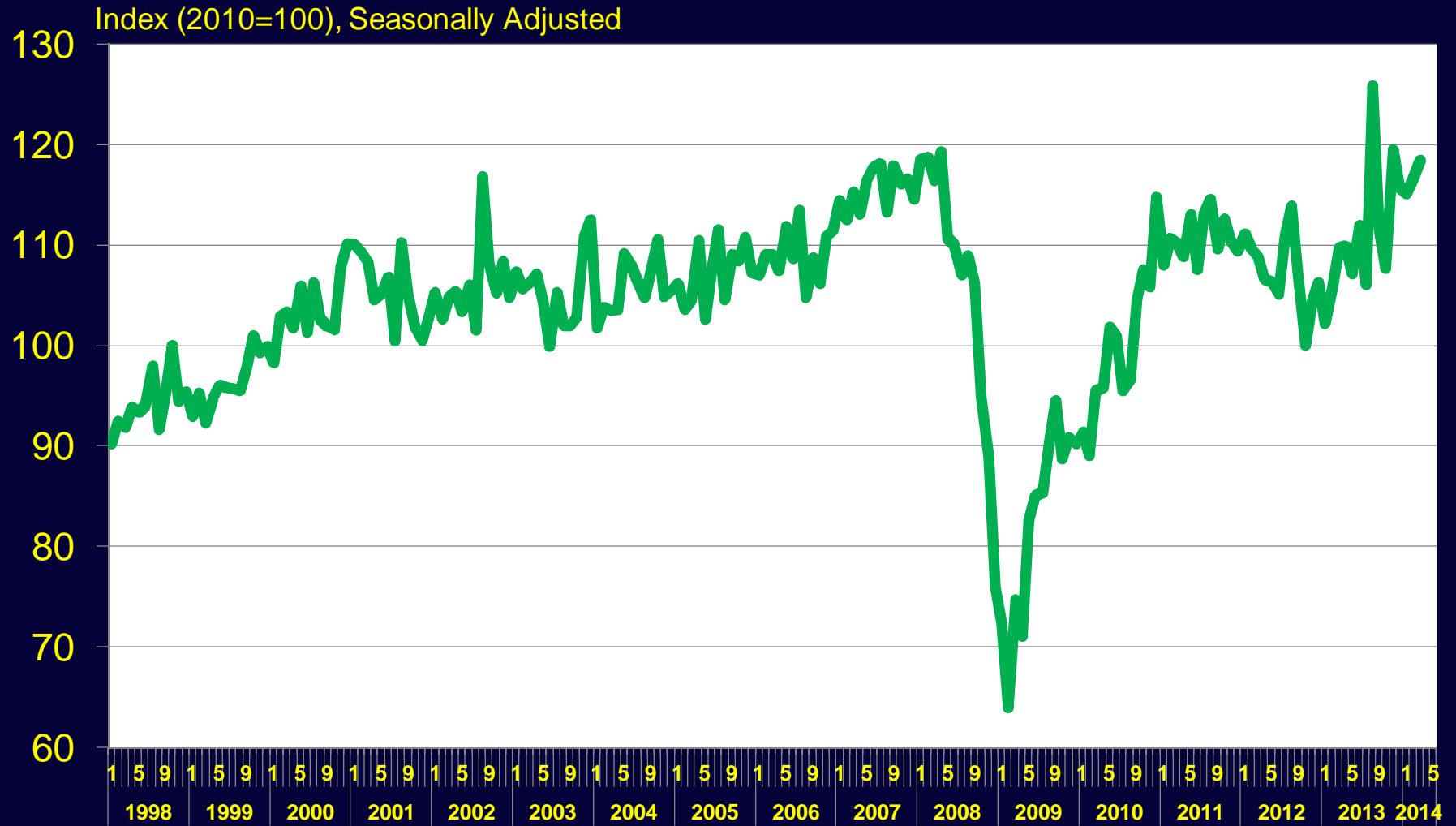
# Chart 10 European Computer, Electronic & Optical Products Production



Eurostat, C26 category, EU 27 countries

Chart 11

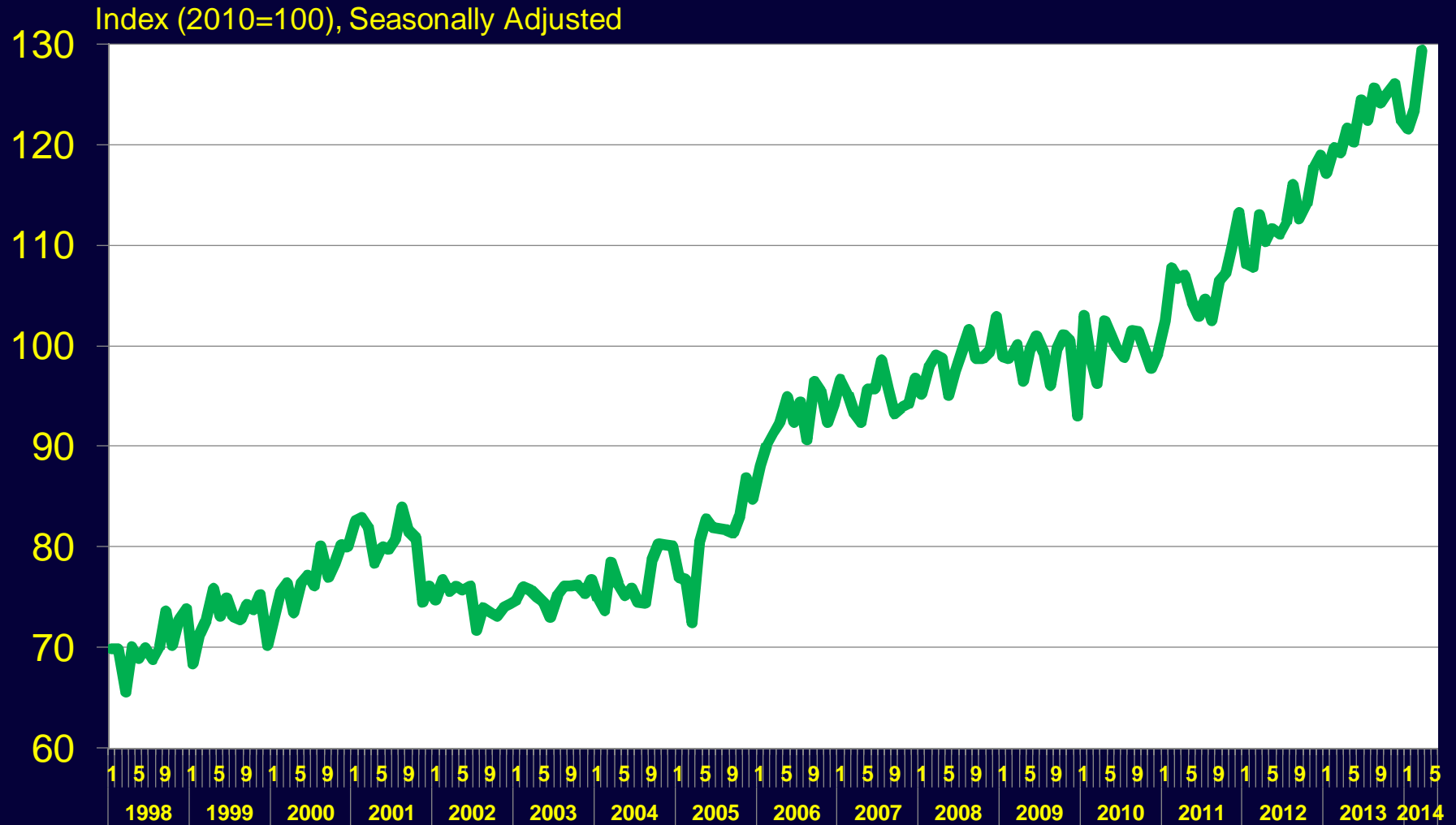
# European Motor Vehicle Production



Eurostat, C291 category, EU 27 countries

Chart 12

# European Production - Aircraft, Spacecraft & Related Equipment



Eurostat, C303 category, EU 27 countries

Chart 13

# European Production - Instruments & Appliances for Measuring, Testing & Navigation

Index (2010=100), Seasonally Adjusted

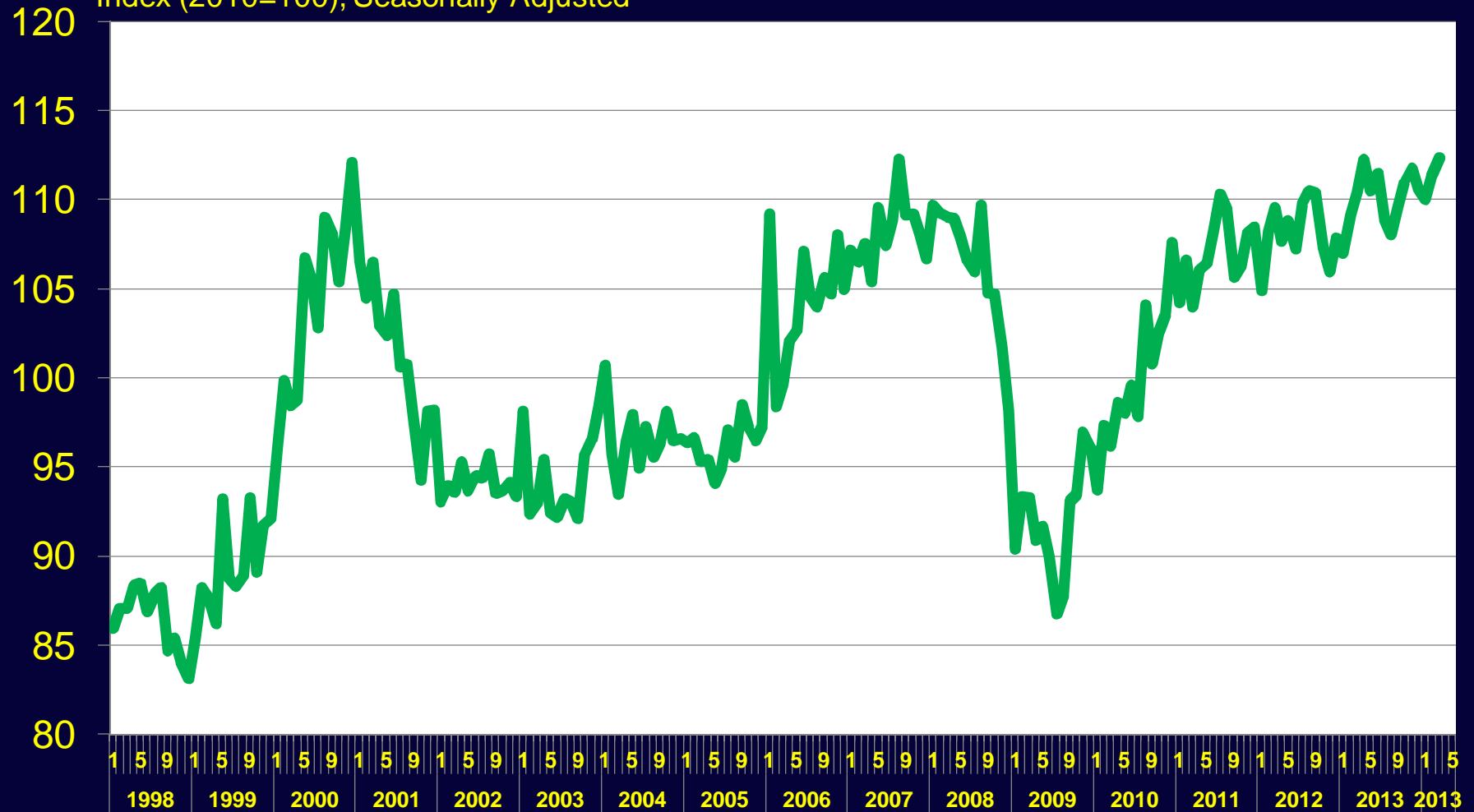


Chart 14

# European Loaded Electronic Board Production



Eurostat, C2612

Chart 15

# European Electronic Components & Board Production

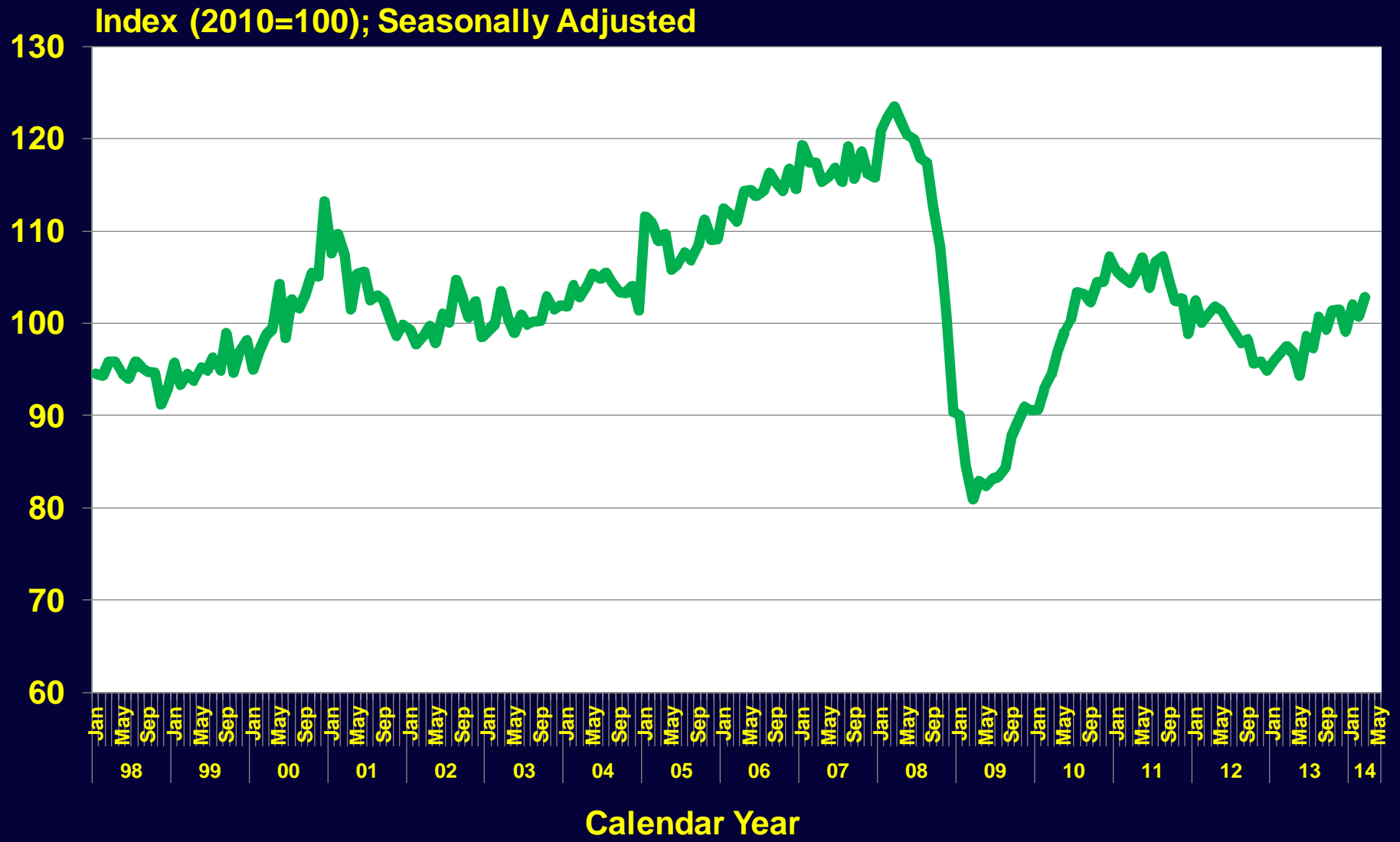
Index (2010=100); Seasonally Adjusted



Eurostat

Chart 16

# European Electronic Wiring Devices

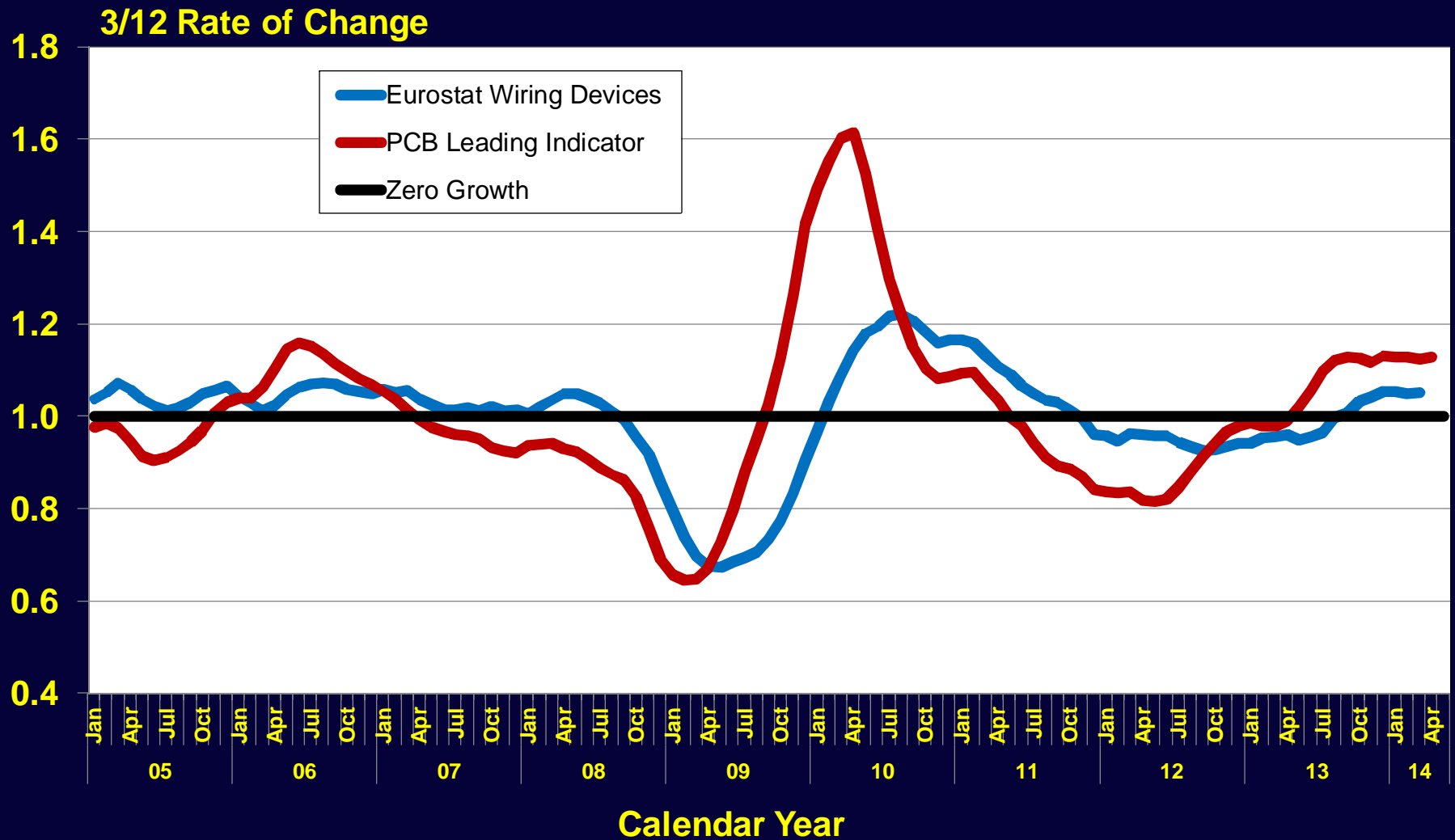


Eurostat



Chart 17

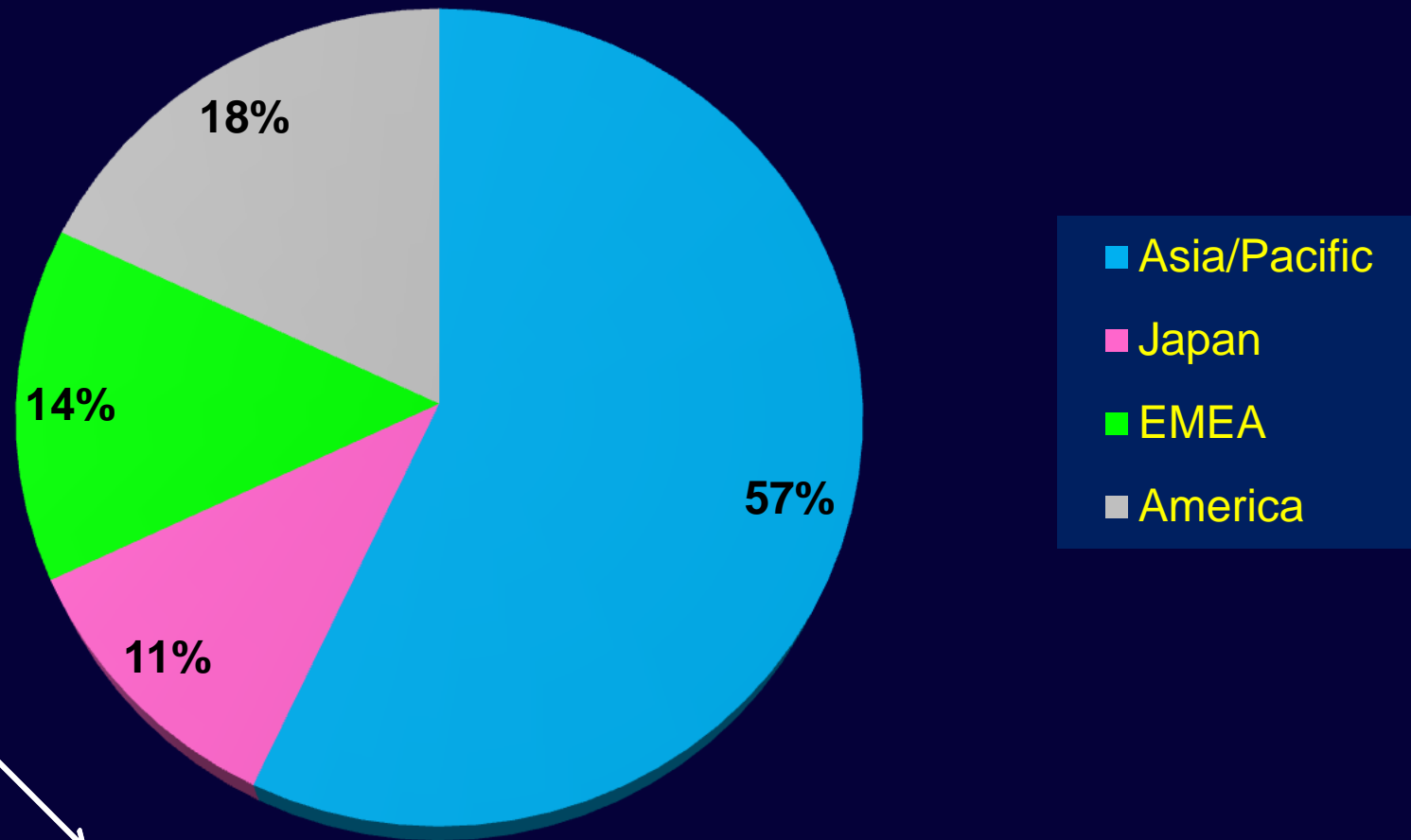
# Europe PMI Leading Indicator vs. Europe Wiring Devices



Source: Custer Consulting Group

Chart 18

# World Market – Electronic Assemblies

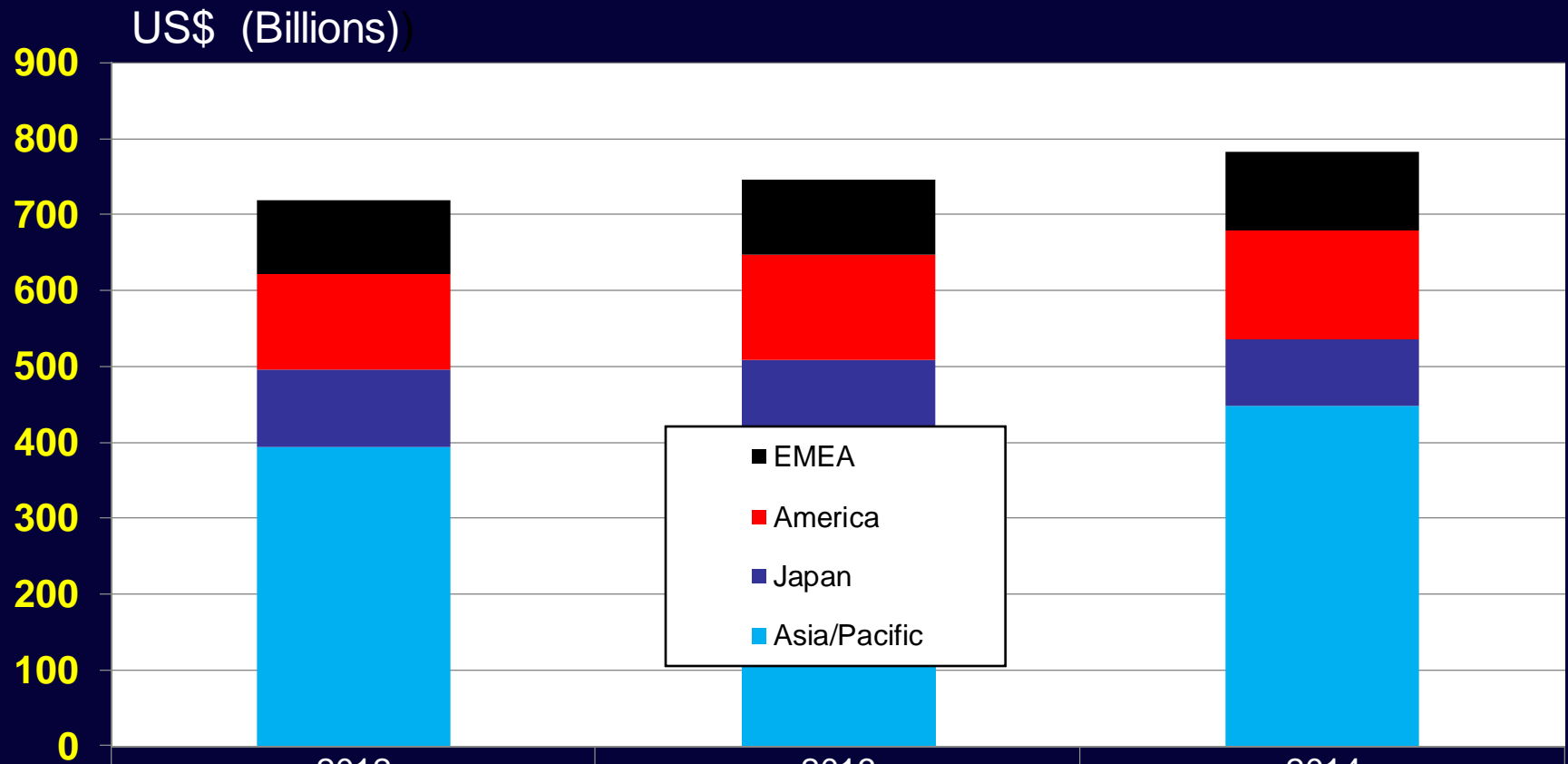


US\$ 744 B  
In 2013

US\$ 784 billion in 2014

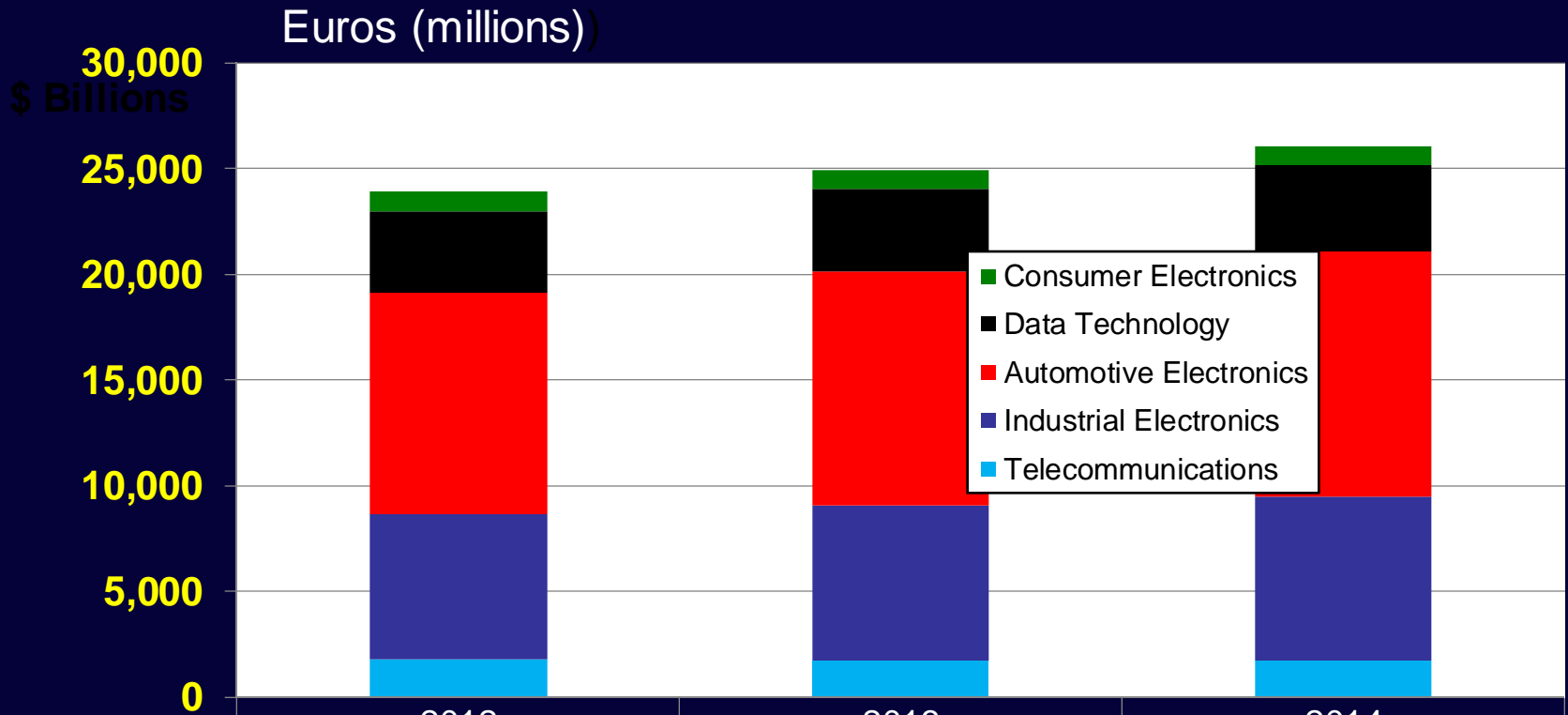
Chart 19

# World Market – Electronic Assemblies 2012-2014



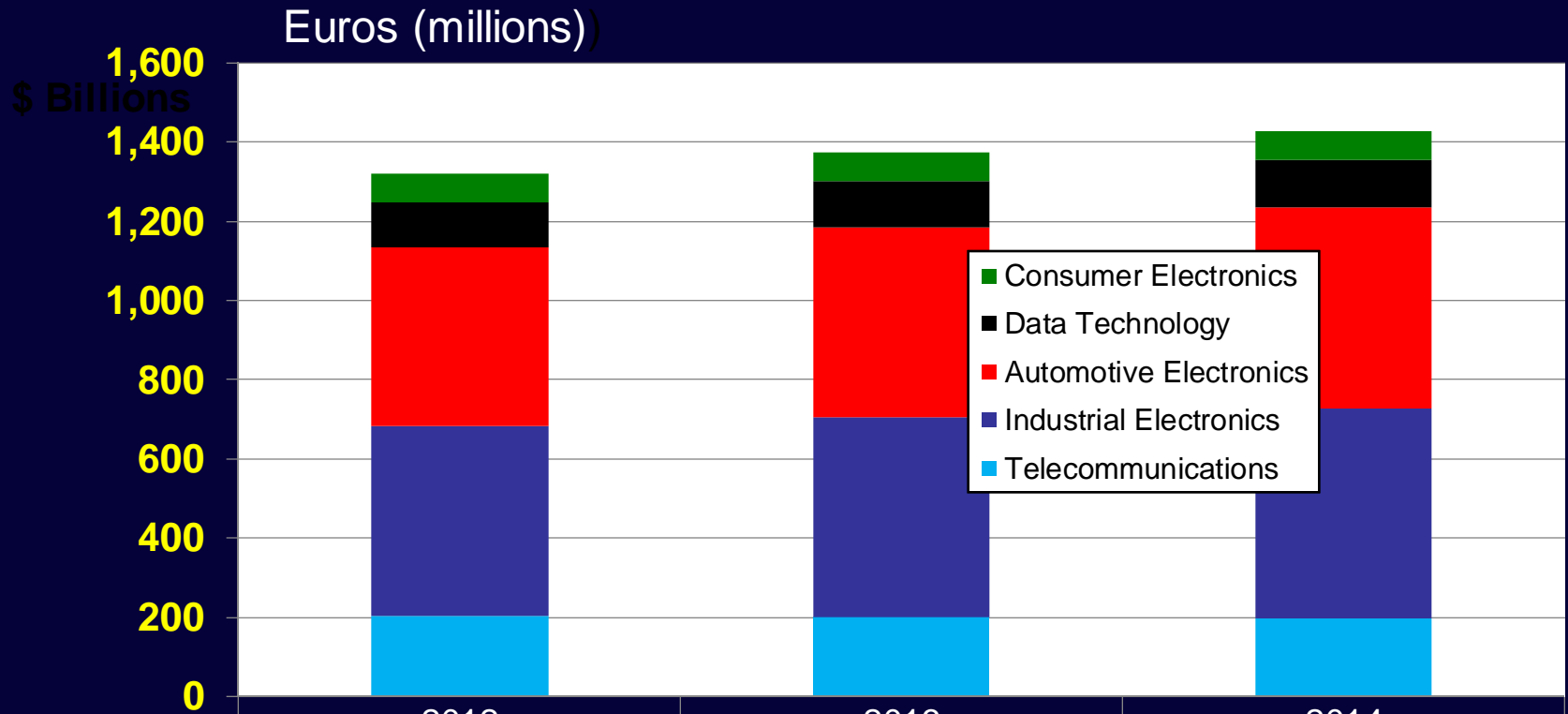
	2012	2013	2014
EMEA	96.1	99.4	102.9
America	126.7	139.1	143.9
Japan	101.6	89.6	88.3
Asia/Pacific	394.7	419.0	448.0

# German Market – Electronic Assemblies 2012-2014



	2012	2013	2014
Consumer Electronics	895	894	902
Data Technology	3,882	3,899	4,031
Automotive Electronics	10,439	11,061	11,649
Industrial Electronics	6,913	7,322	7,708
Telecommunications	1,802	1,785	1,789

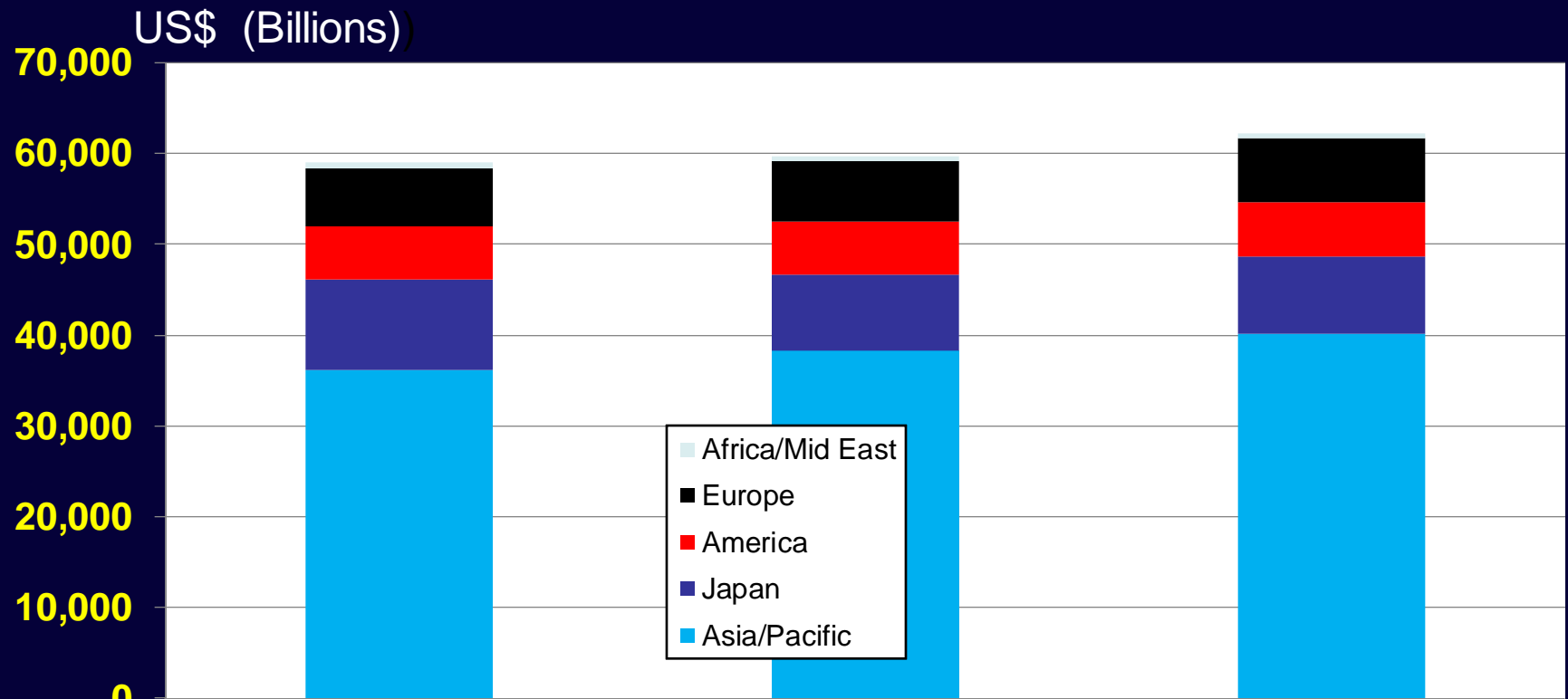
# German PCB Market 2012-2014



	2012	2013	2014
Consumer Electronics	74	74	74
Data Technology	114	117	118
Automotive Electronics	451	478	509
Industrial Electronics	480	506	532
Telecommunications	204	201	197

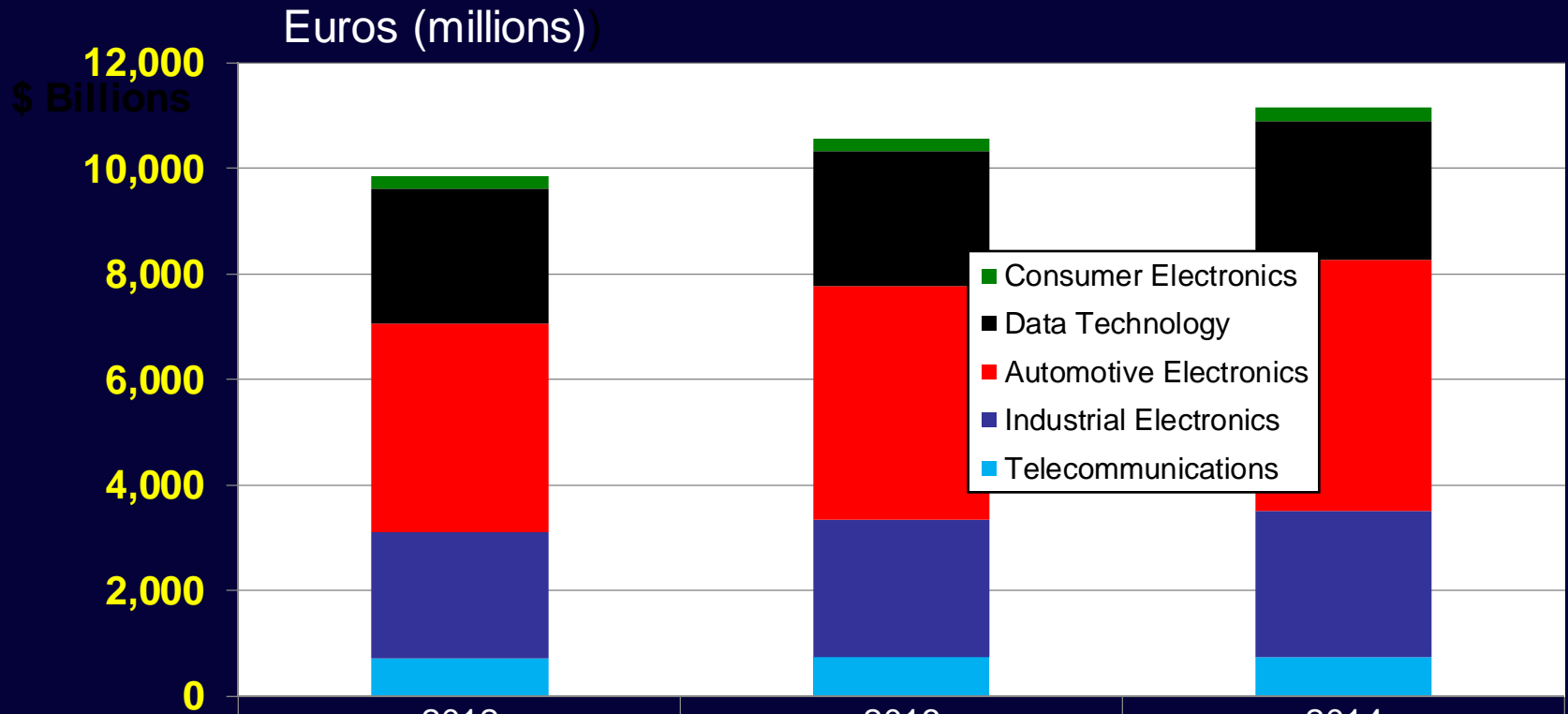
Chart 22

# World PCB Market 2012-2014



	2012	2013	2014
Africa/Mid East	610	564	553
Europe	6,426	6,683	6,984
America	5,791	5,878	5,995
Japan	10,046	8,338	8,505
Asia/Pacific	36,169	38,339	40,256

# German Semiconductor Market 2012-2014



	2012	2013	2014
Consumer Electronics	239	243	246
Data Technology	2,543	2,549	2,638
Automotive Electronics	3,956	4,435	4,756
Industrial Electronics	2,386	2,603	2,772
Telecommunications	743	746	746

Chart 24

## Top 20 Fabless IC Suppliers 2013 Sales (\$M)

Qualcomm	17,211
Broadcom	8,219
AMD	5,299
MediaTek	4,587
Nvidia	3,898
Marvell	3,352
LSI	2,370
Xilinx	2,297
Altera	1,732
Avago	1,619
Novatek	1,398
HiSilicon	1,355
MStar	1,136
Spreadtrum	1,070
CSR	961
Realtek	951
Dialog	903
Cirrus Logic	772
Himax	771
Silicon Labs	580
MegaChips	577
Semtech	555
PMC-Sierra	508
IDT	475
Microsemi	433
Top 25	63,029
Others	14,882
<b>Total Fabless</b>	<b>77,911</b>

IC Insights 5/14



Chart 25 **Fabless Company IC Sales as % of World IC Sales**

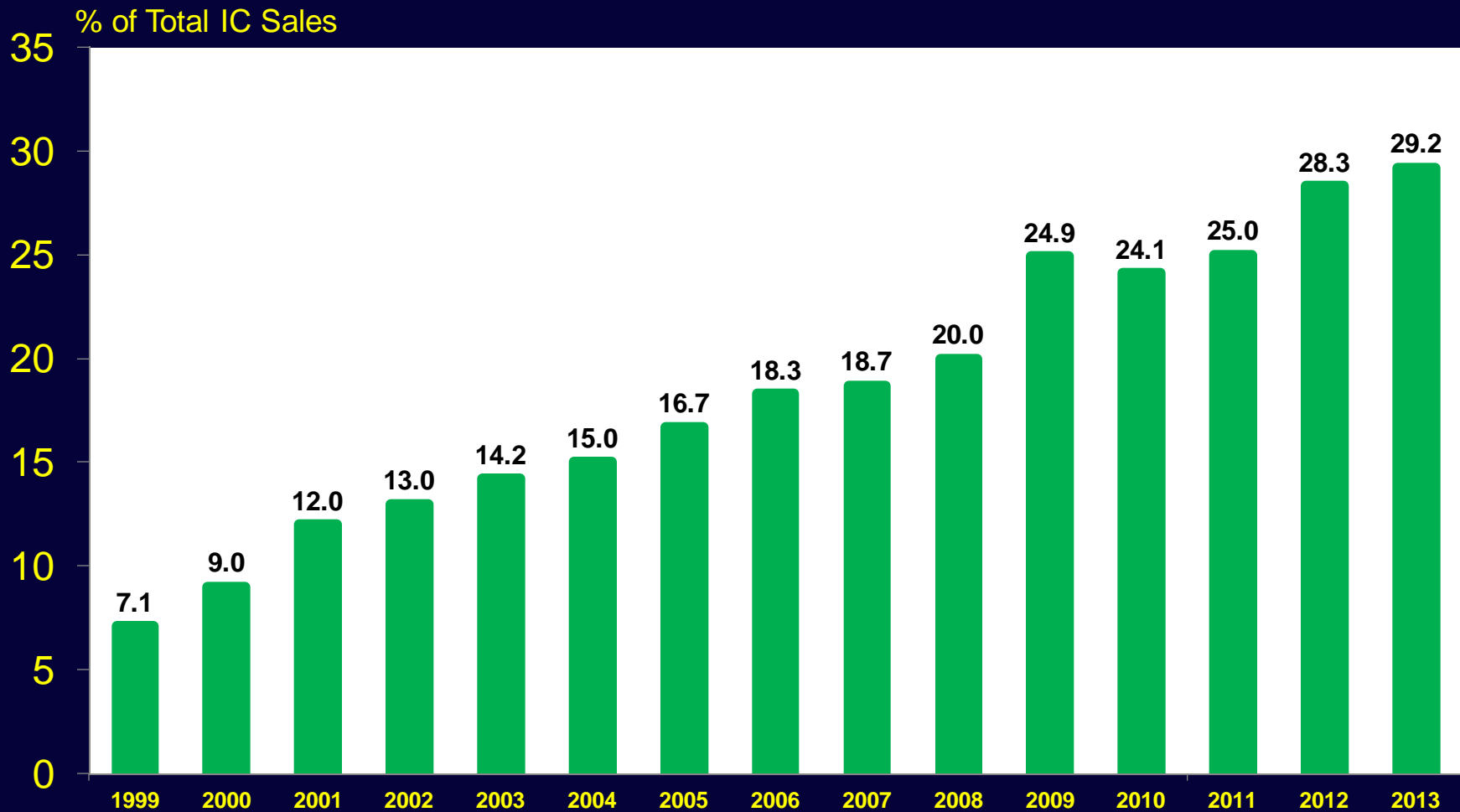


Chart 26

## Automotive TFT LCD Manufacturer Shipment Share 2013

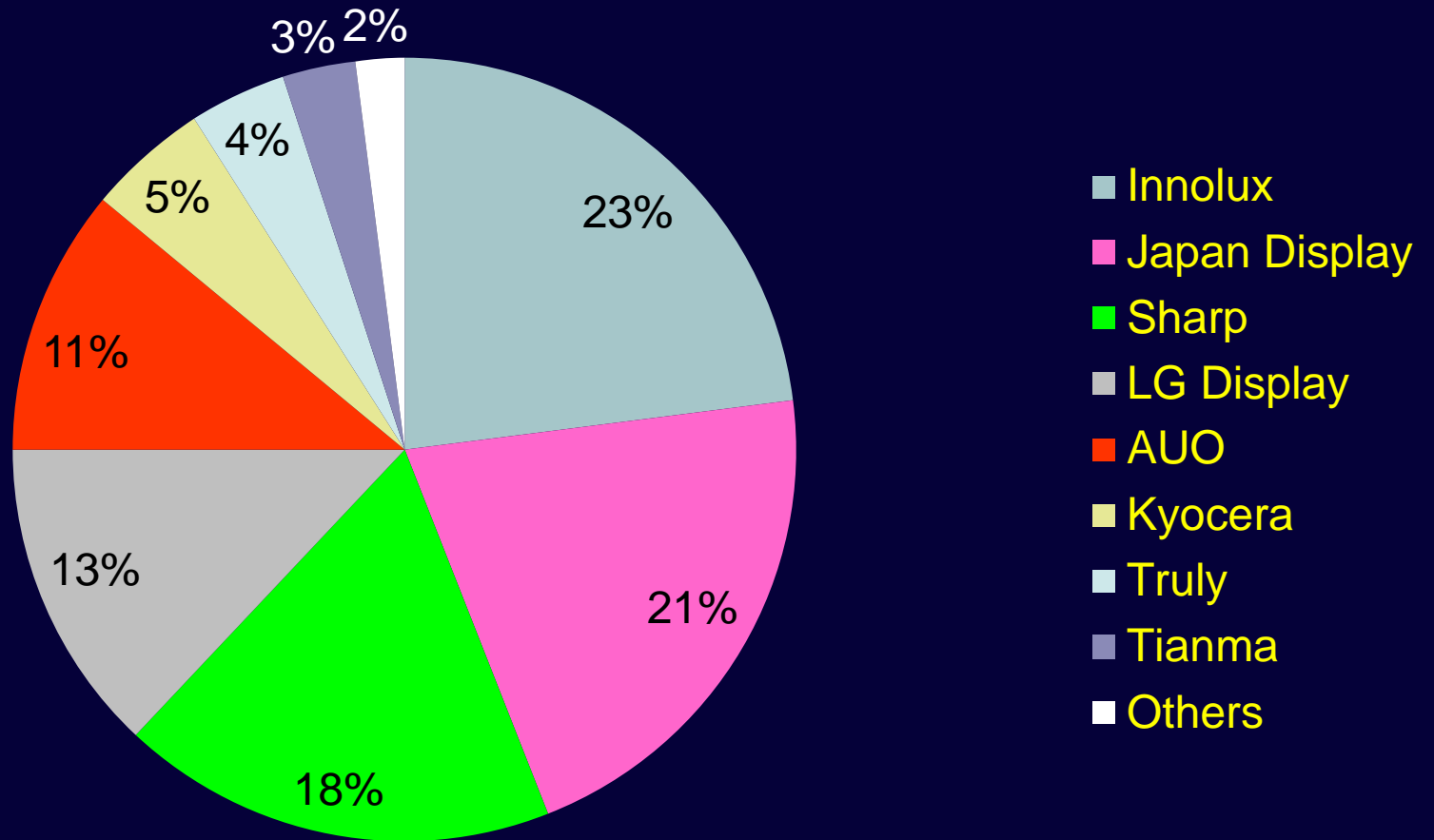


Chart 27

# Global Merchant Power Supply Rankings

## Revenue in \$ Millions

to		<u>2012</u>	<u>2013</u>	<u>% Chg</u>	
1	<b>Delta Electronics</b>	3,654	3,572	-2.2%	<a href="http://www.avnet.com">www.avnet.com</a>
2	<b>Emerson</b>	1,857	1,735	-6.6%	
3	<b>Lite-On Technology</b>	1,433	1,473	+2.8%	
4	<b>Acbel Polytech</b>	686	677	-1.3%	
5	<b>Salcomp</b>	470	650	+38.3%	
6	<b>Mean Well</b>	444	558	+25.7%	
7	<b>Eltek</b>	550	546	-0.7%	
8	<b>Murata</b>	585	545	-6.8%	
9	<b>TDK Lambda</b>	565	542	-4.1%	
10	<b>GE Energy</b>	484	520	+7.4%	
	<b>Total top 10</b>	10,728	10,818	+0.8%	
	<b>Other</b>	9,459	9,851	+4.1%	
	<b>Total Industry</b>	20,187	20,669	+2.4%	

Chart 28

# U.S. Industrial Production

Index (2007=100)

IP

