

World Electronic Equipment Monthly Shipments

Converted @ Fluctuating Exchange Rates

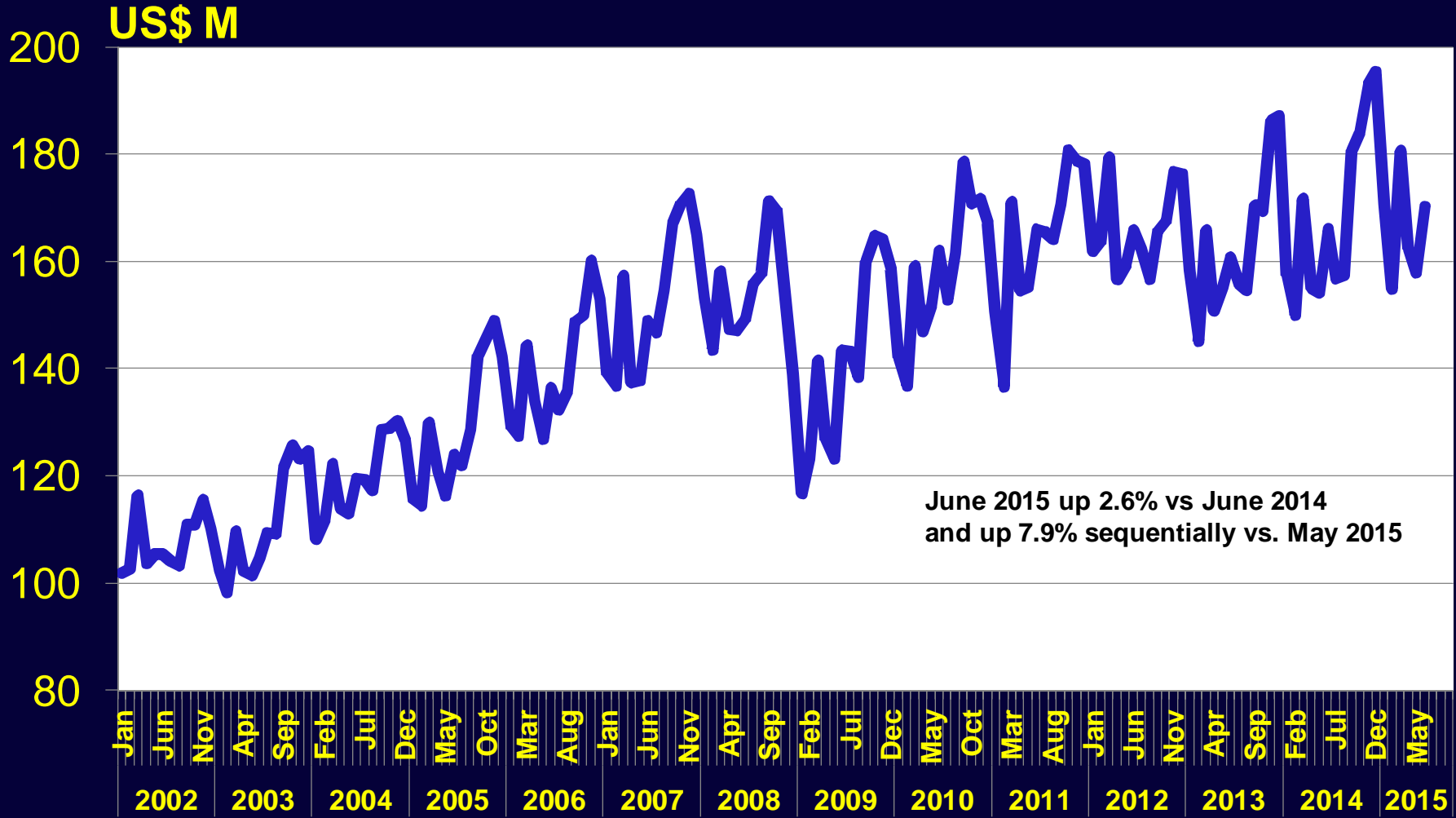
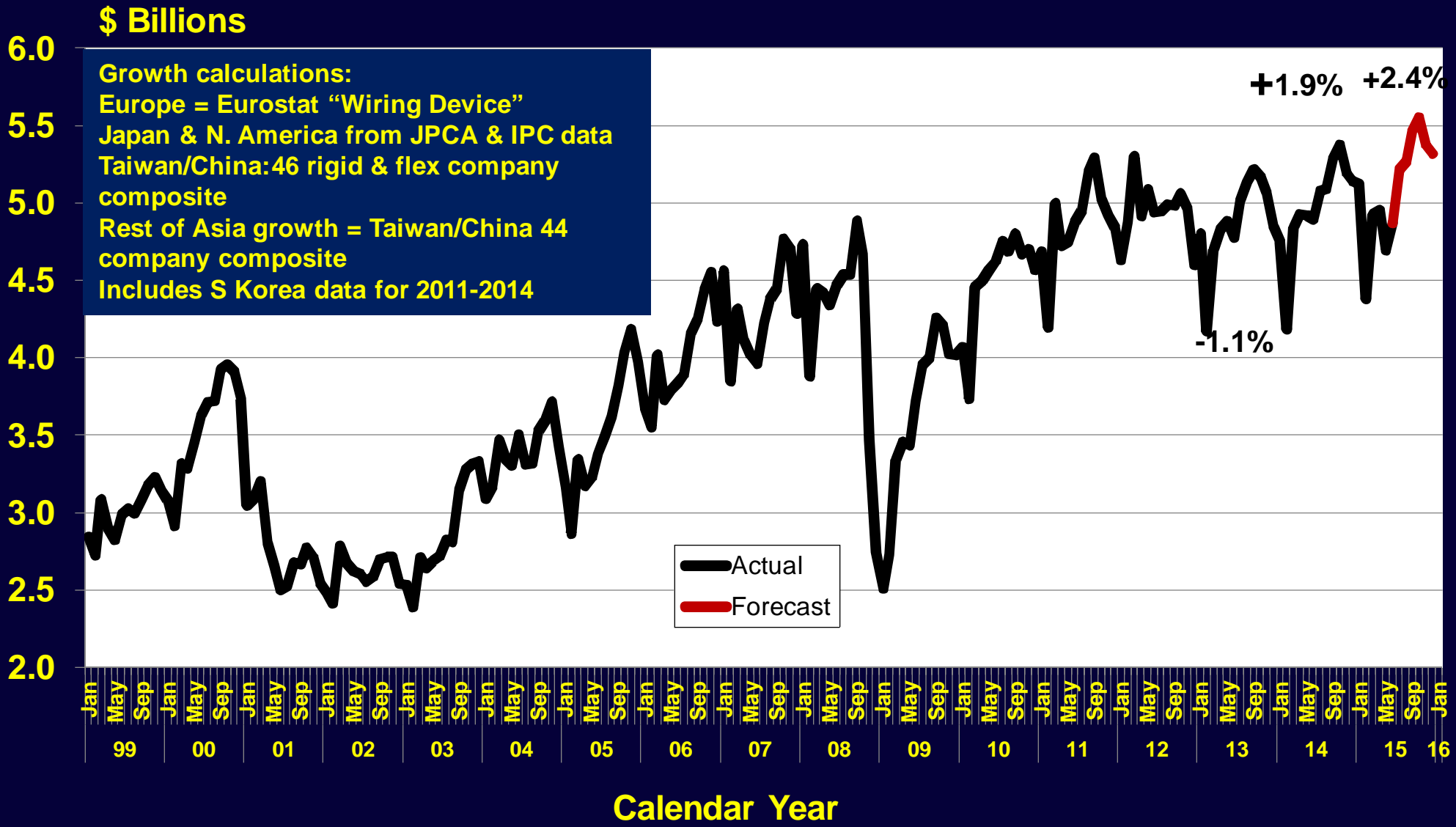


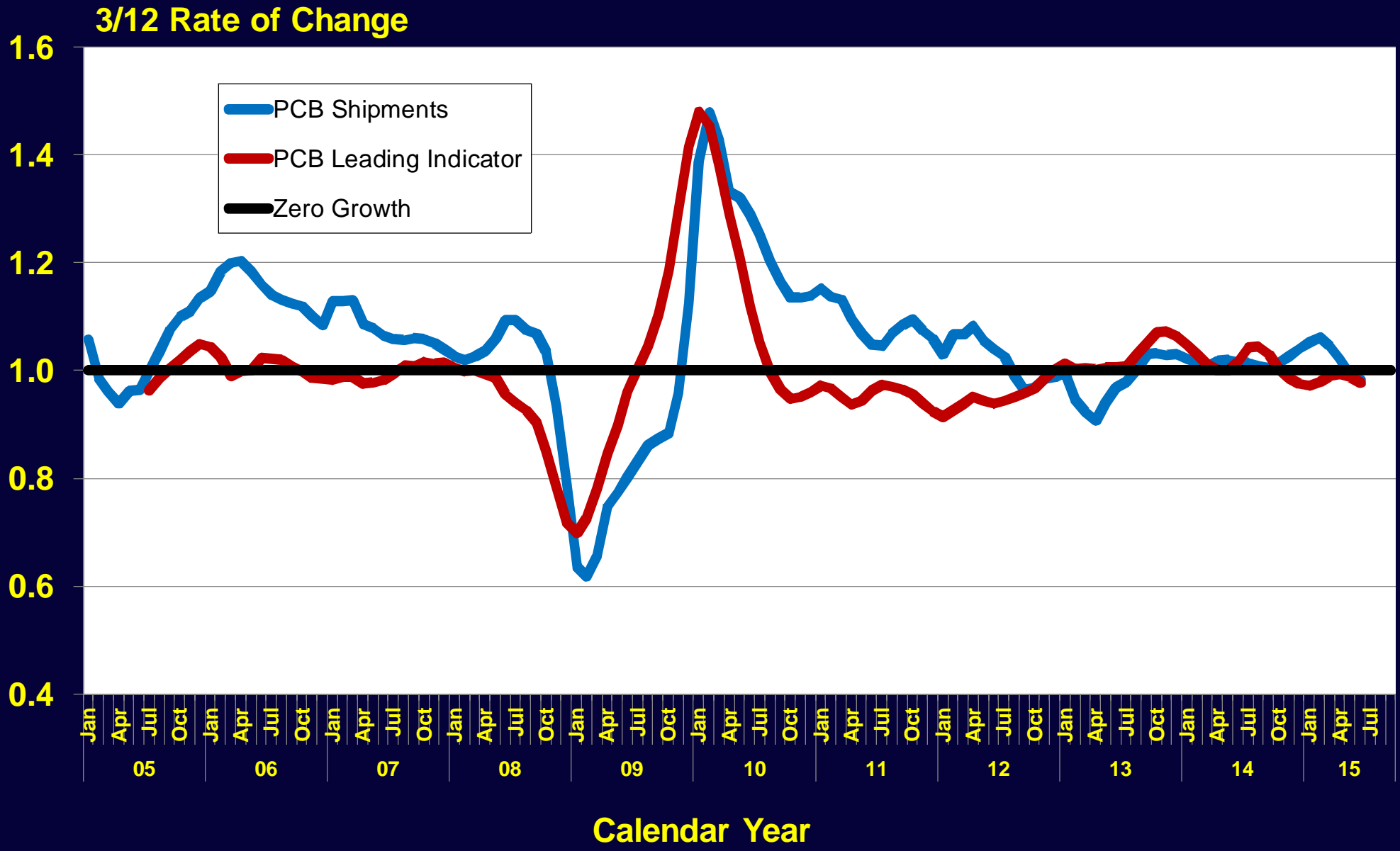
Chart 2

World PCB Shipments (with forecast) Converted @ Fluctuating Exchange Rates



Source: Custer Consulting Group - 2010 base year expanded by monthly growth of N. American, European, Japanese & Taiwan/China monthly PCB shipments

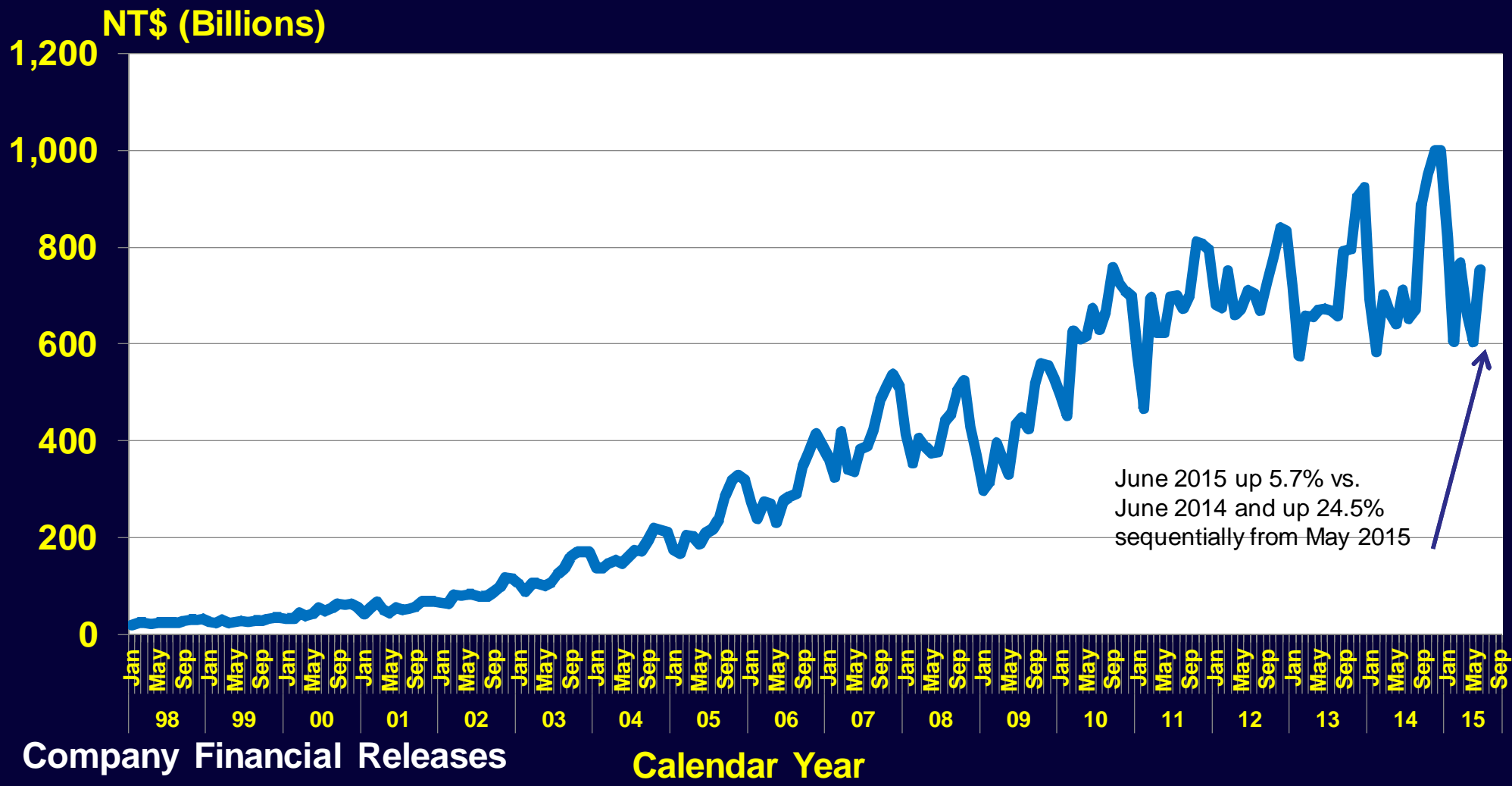
CCG Global PCB Leading Indicator vs. Global PCB Shipments @ Fluctuating Exchange



Source: Custer Consulting Group

Chart 5

Taiwan ODM Companies Composite Sales of 11 Large Manufacturers

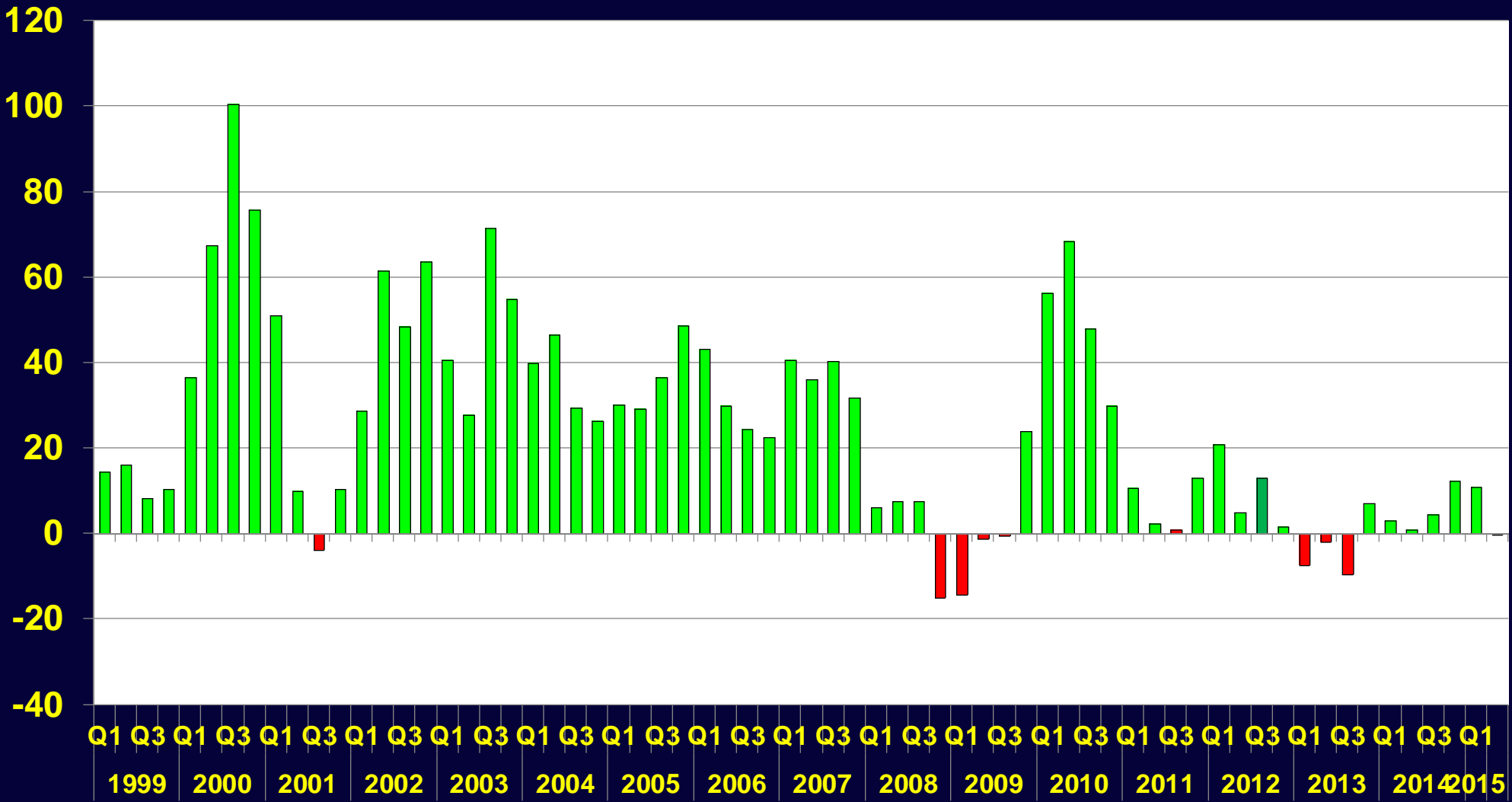


Asustek Computer, Chei Mei, Compal Electronics, Foxconn, Chimei Innolux, Inventec, Inventec Appliance, Lite On Technology, Mitac International, Pegatron, Quanta Computer, Wistron, Chei Mei Display replacing Chei Mei & Innolux Display 3/10 & later

Large ODM Companies

Composite of 10 Public Manufacturers

Quarterly Revenue Growth



Asustek Computer, Compal Electronics, Foxconn, Chimei Innolux, Inventec, Inventec Appliance, Lite On Technology, Mitac International, Pegatron, Quanta Computer, Wistron

Chart 7

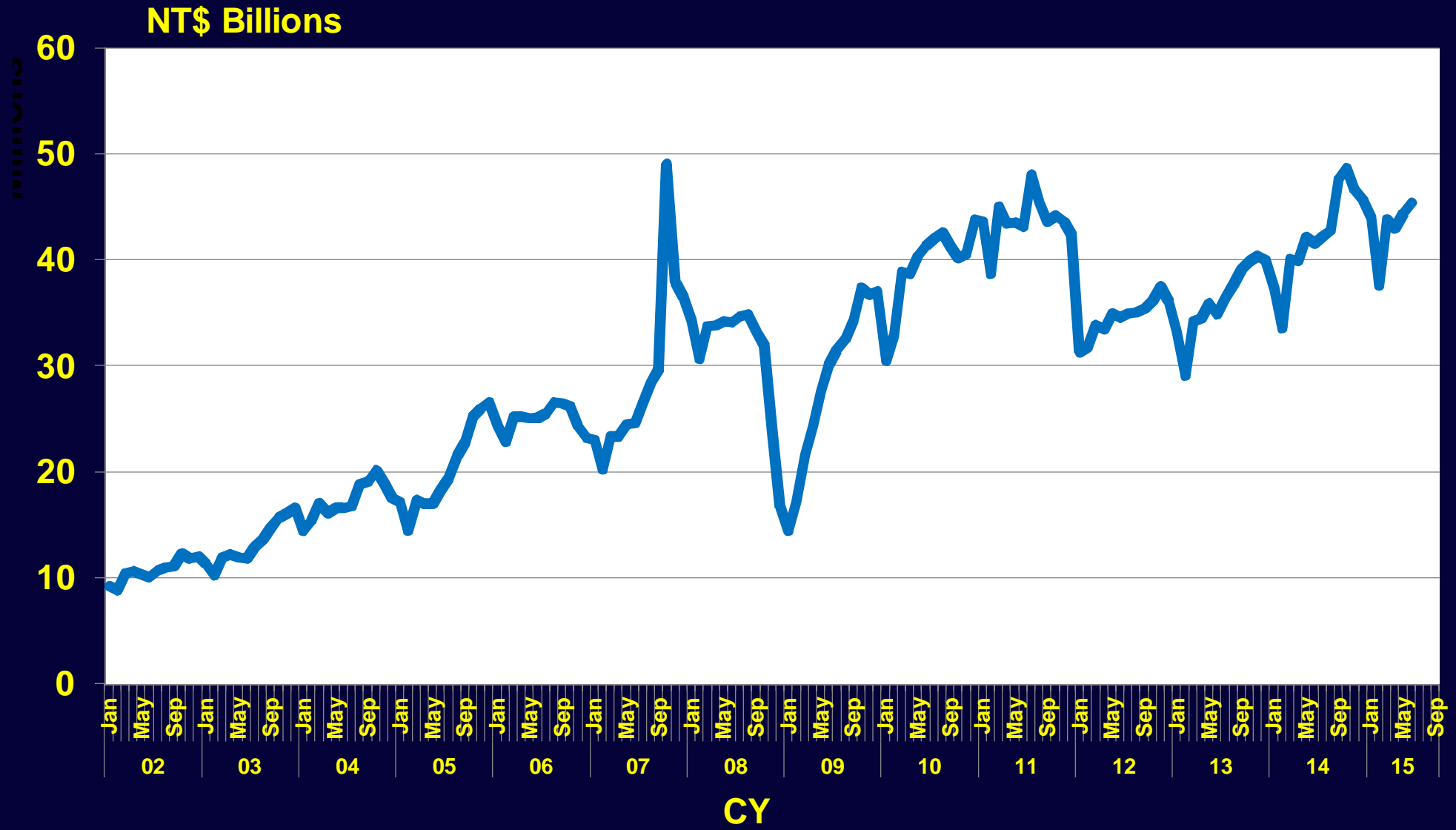
Taiwan Wafer Foundries Composite of 14 Manufacturers



VIA Technologies, Advance Microelectronics, Advance Wireless Semiconductor, Epasil Technologies, Inotera Memories, Macronix Intl, Mosel Vitelic, Powerchip Semi, Precision Silicon, ProMOS Tech, TSMC, United Microelectronics, Vanguard International Semi, Winbond Electronics

Chart 8

Taiwan Package & Test Companies Composite of 20 Manufacturers



ASE, Ardentec, ChipMOS Tech, Chipbond Tech, E'dale Tech, Formosa, Advance Tech, Fupo Elec, Greatek Elec, International Semiconductor Tech, King Yuan Elec, Lingsen Precision, Orient Semiconductor, Powertech Tech, Signality System, Sigurg Microelectronics, SPIL, Thalín Semiconductor, Vate Tech, Walton Advanced Tech

Chart 10

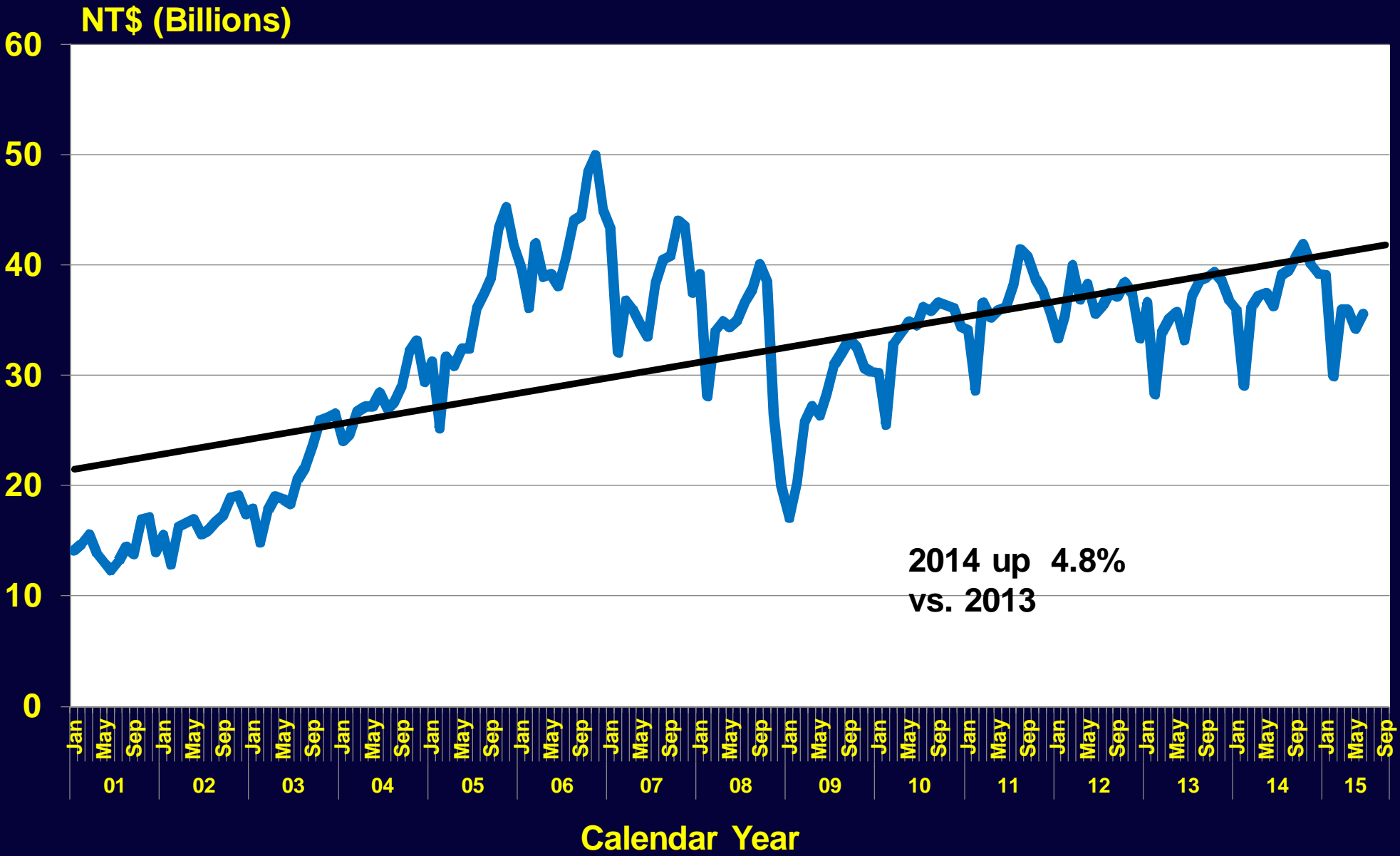
Taiwan Passive Component Companies Composite of 25 Manufacturers



Chilsin Electronics, Cyntec, (FCE) Feei Cheng Enterprise, Holy Stone Enterprise, 3H (Honey Hope Honesty Enterprise), HJC (Hua Jung Components), Inpaq, Jaan Chem Technological, Kaimei Electronic, King Core Electronics, Laser Tek, Leatec Fine Ceramics, Lelon Electronics, Linton Technology, PTTC (Polytronics Technology Corp), PDC (Prosperity Dielectrics Co), Ralec Electronic, Ta-I Technology, Taiwan Alpha Electronic, Team Young Advanced Ceramics, Teapo Electronic, Thinking Electronic Industrial, WTC (Walsin Technology Corp), Yageo, YCTC (Yeh-Chiang Technology Corp)

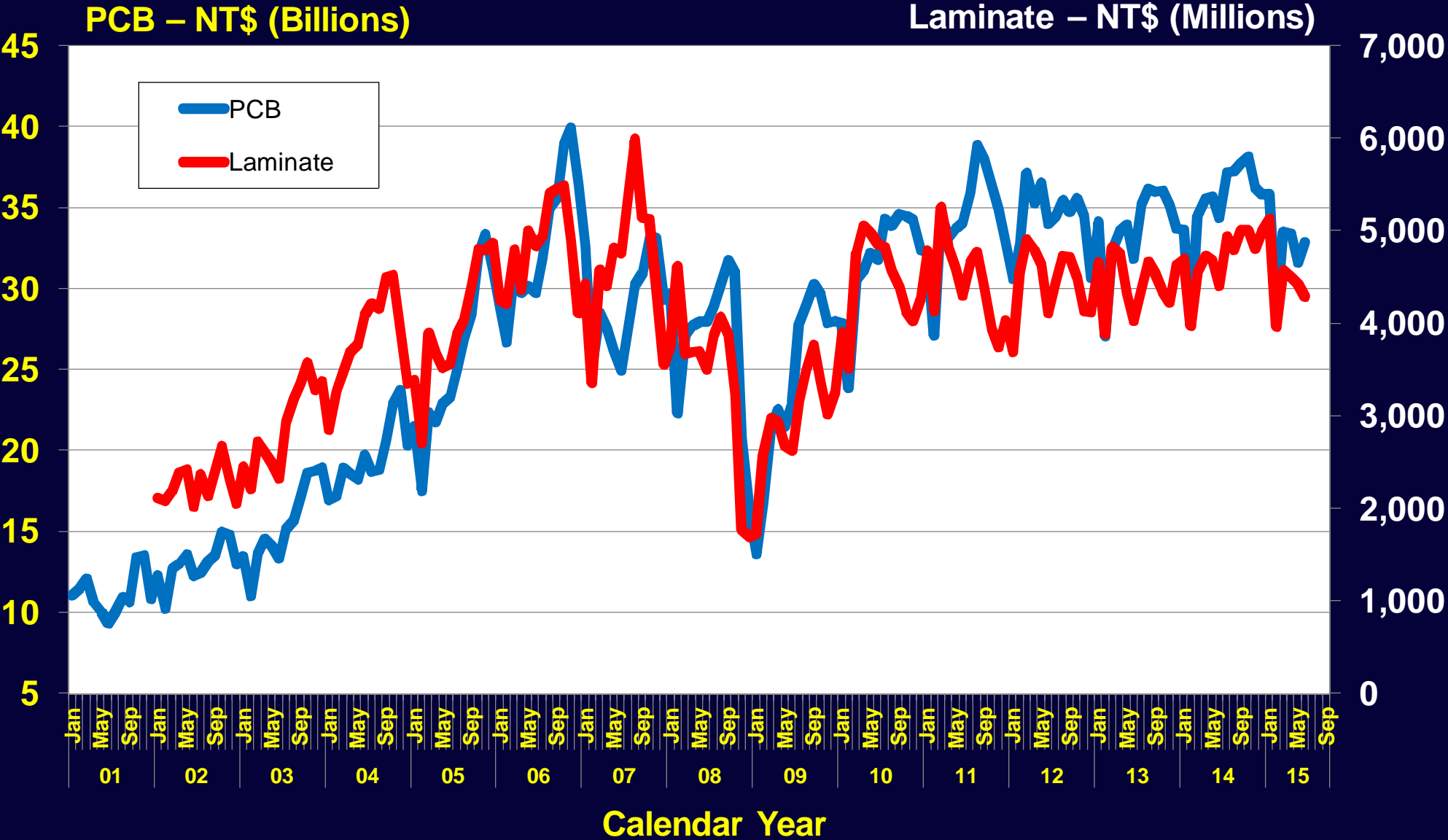
Taiwan Rigid & Flex PCB Shipments

Broad Composite of 46 Taiwan-listed Manufacturers



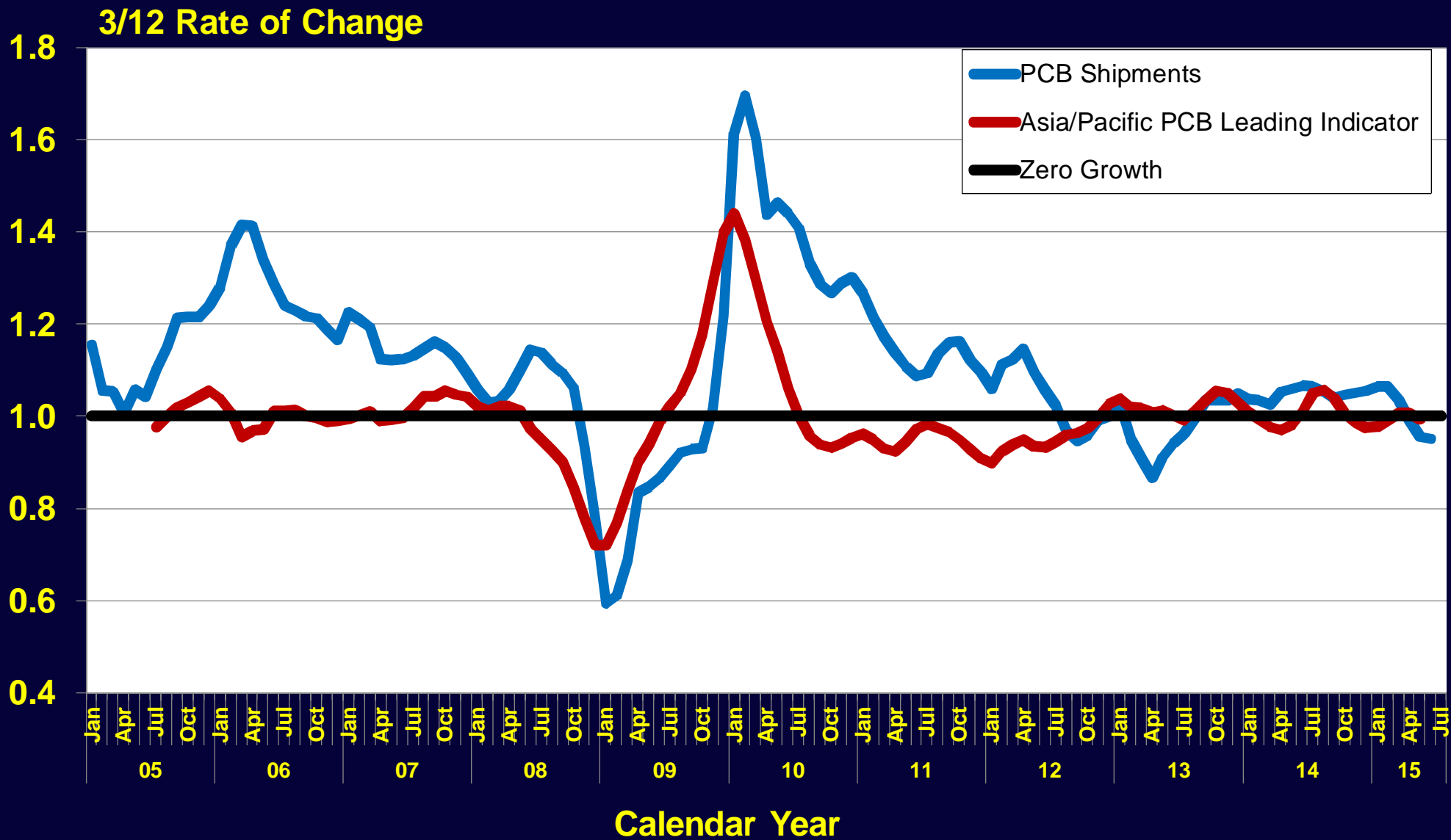
Taiwan Shipments

42 Rigid PCB & 8 Laminate Manufacturers



Company Financial Releases

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



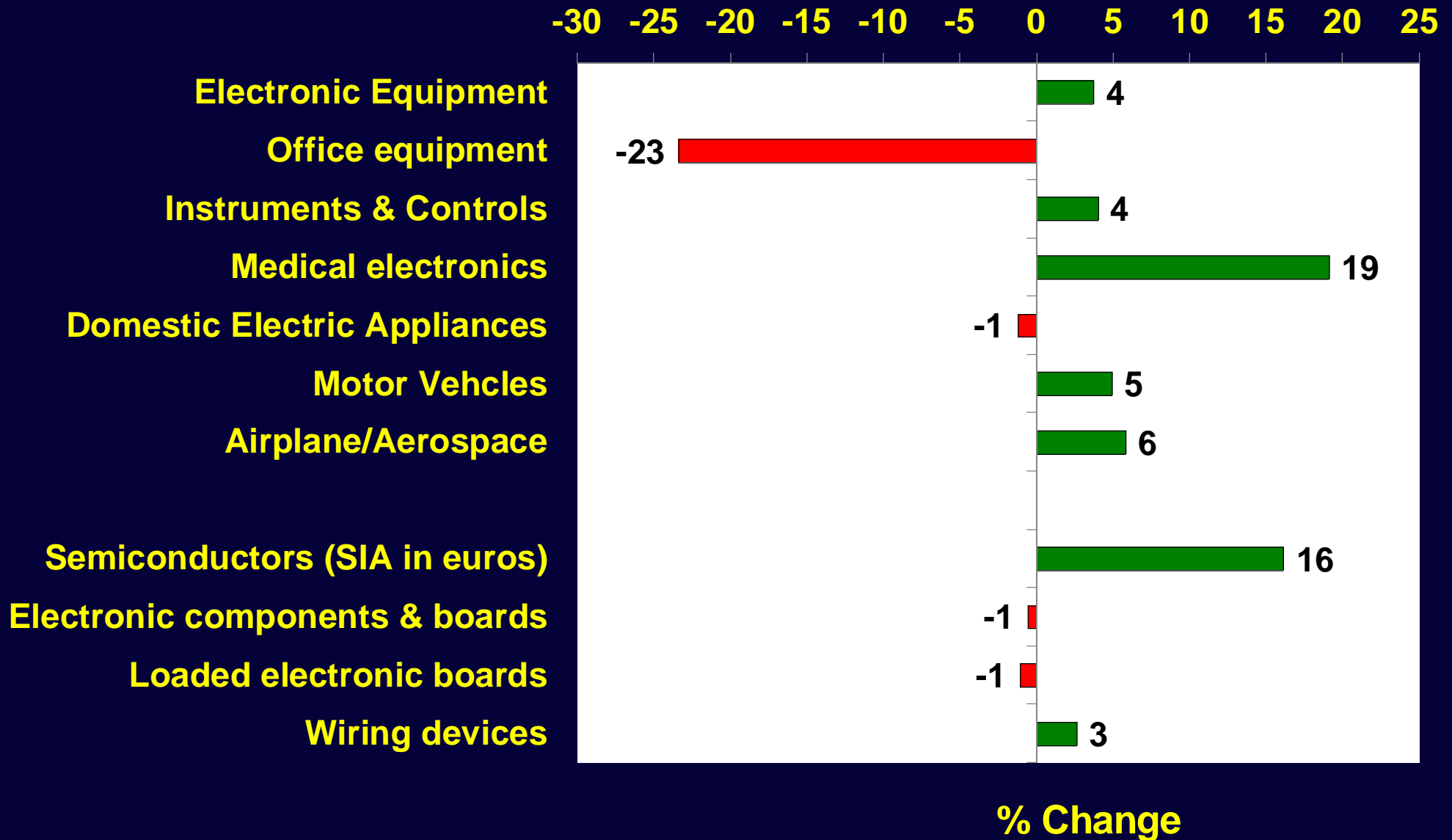
Source: Custer Consulting Group

Taiwan Solar/Photovoltaic Panel Companies Composite of 27 Manufacturers



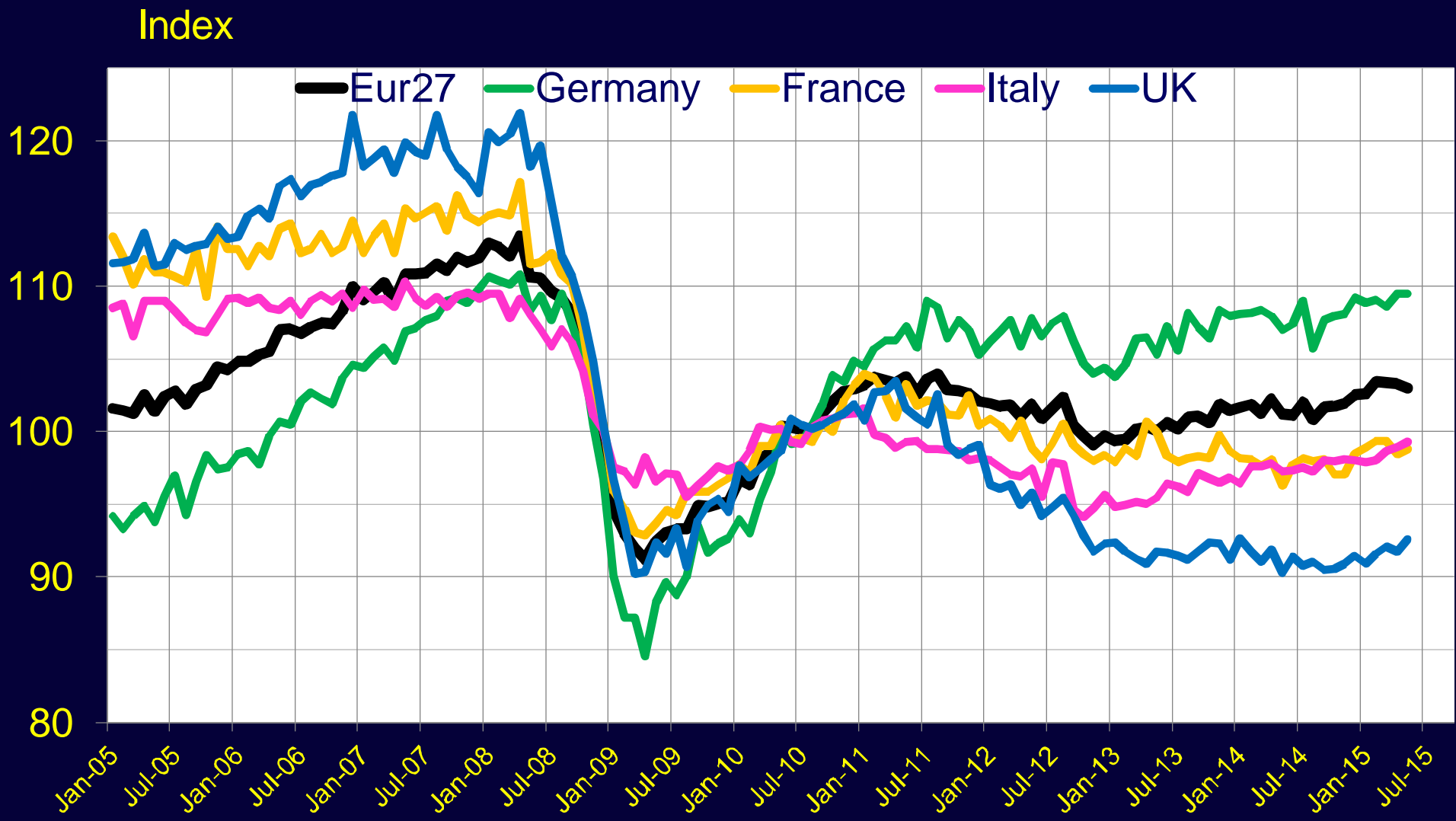
Acter, Big Sun Energy Technology, Chen Full Intl, Danen Technology, Daxon Technology, DeISolar, Delta Electronics, e_TON Solar Tec, Invetec Group, Eversol, Gigasolar materials, Gintech, Green Energy Technology (GET), Higher Way Elec, Kenmec Mechanical, Ligitek, Motech, Neo Solar Power, Phoenixtec Power Co (PPC), Powermate, Precision Silicon, Sino-American Silicon Products (SAS), Solar Applied Materials Technology, Solartech Energy Corp, Sunrise Global Solar Energy, Sysgration, Tainenergy Tech, Tera Autotec, Tyntek, Wafer Works, Wholetech System Hitech

European Electronic Supply Chain Growth Mar-May'15 vs Mar-May'14

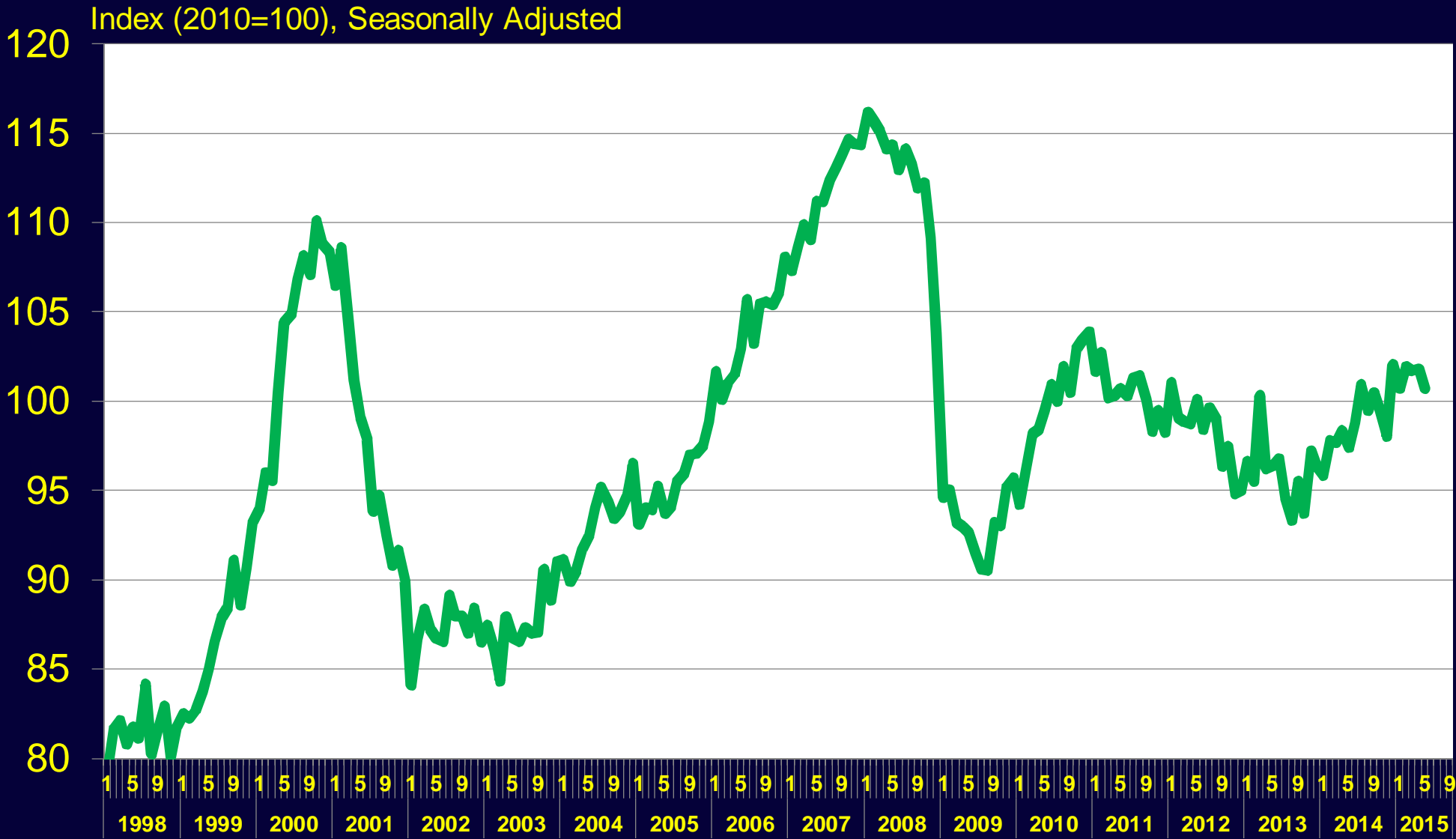


Industrial Production - Europe

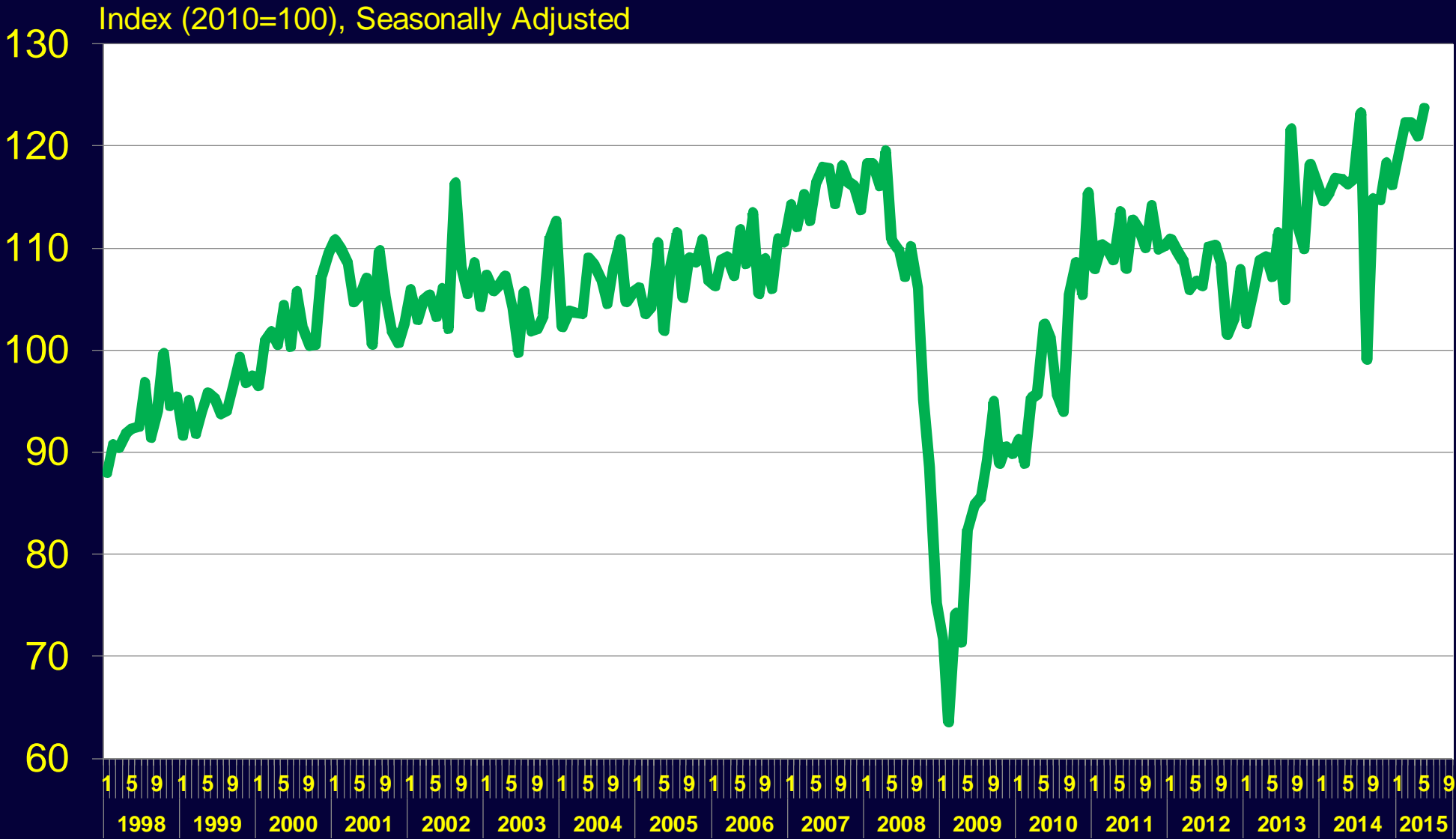
Index (2010 Avg. Month = 100, Seasonally Adjusted)



European Computer, Electronic & Optical Products Production

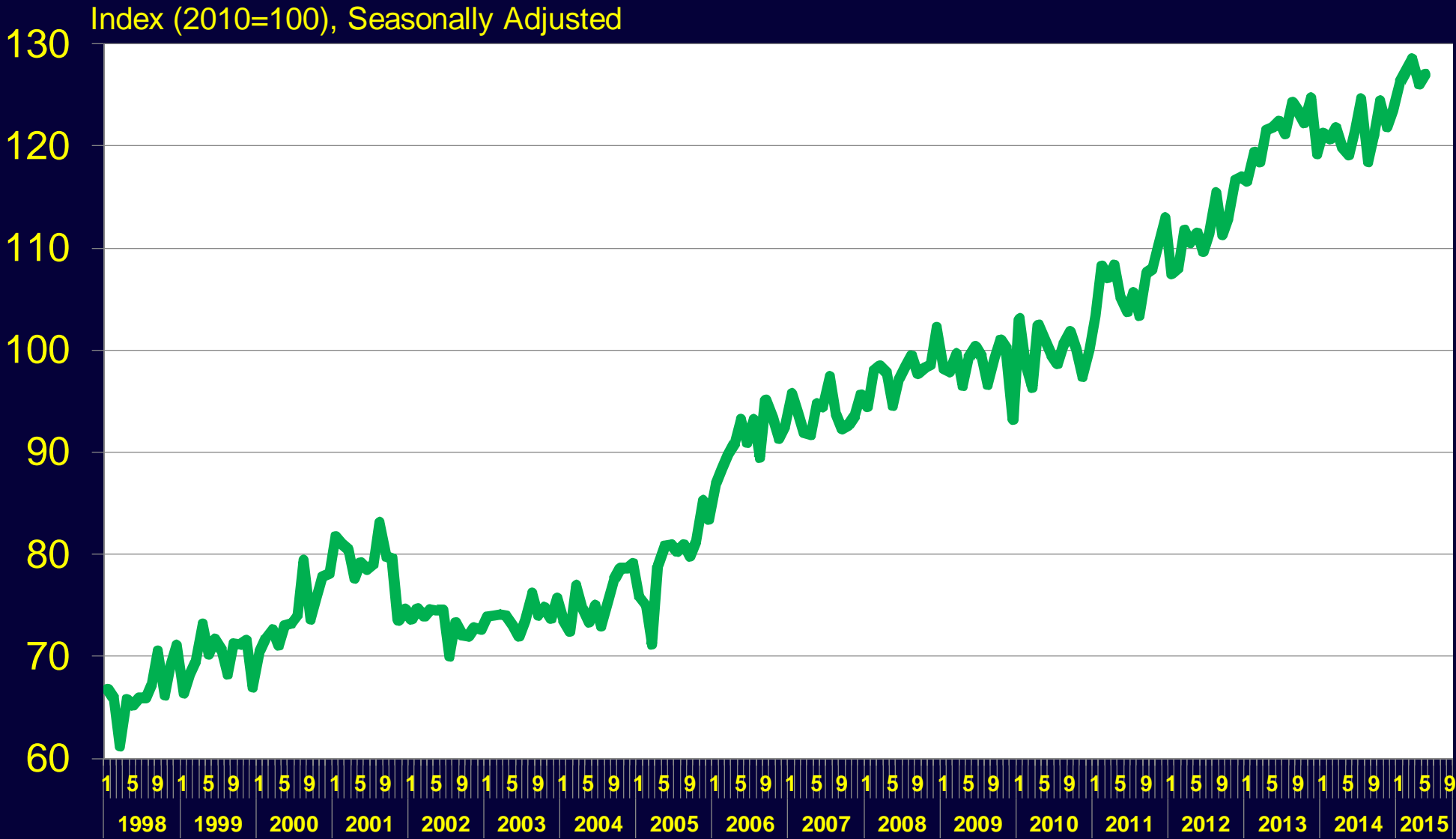


European Motor Vehicle Production

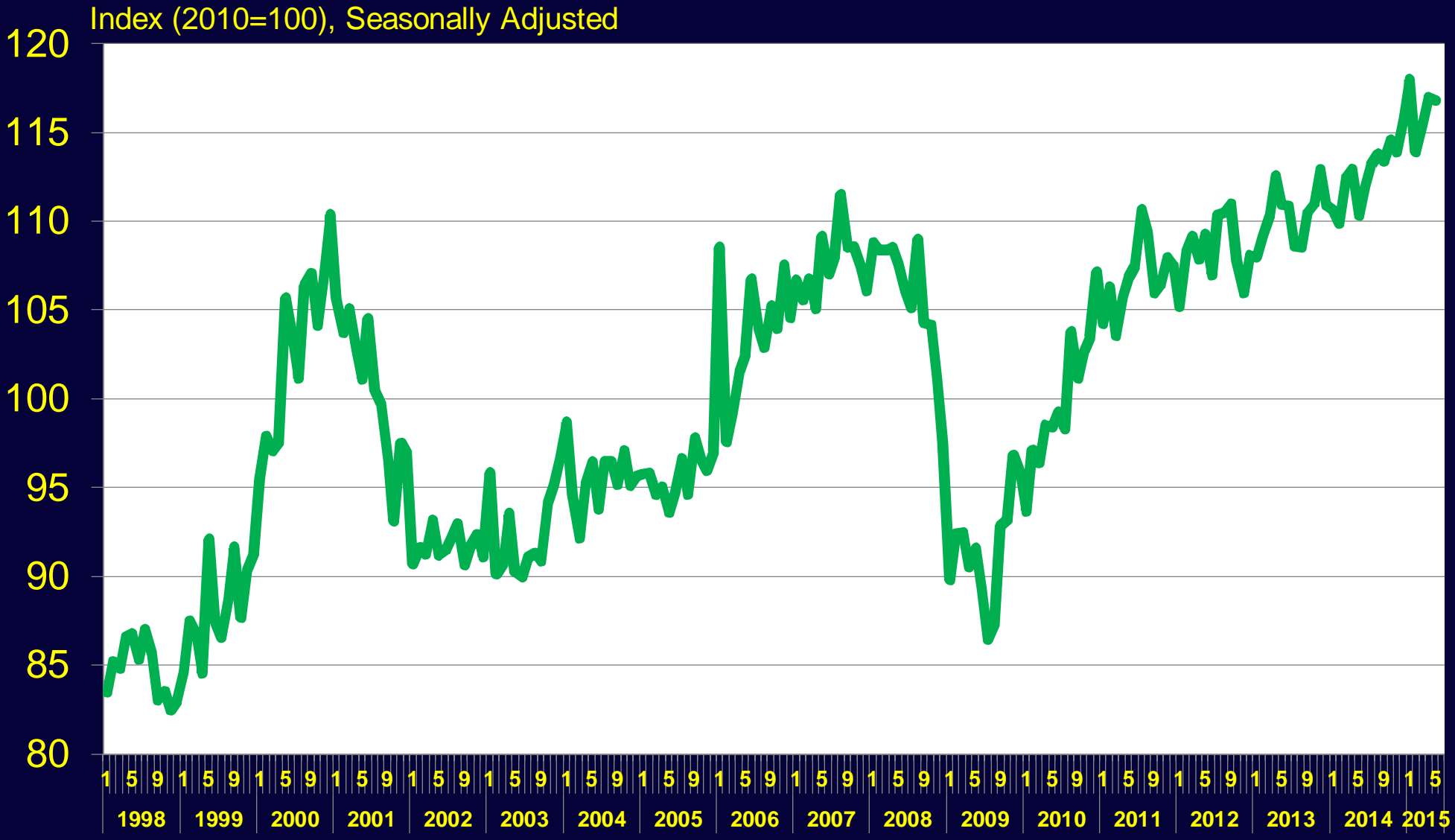


Eurostat, C291 category, EU 27 countries

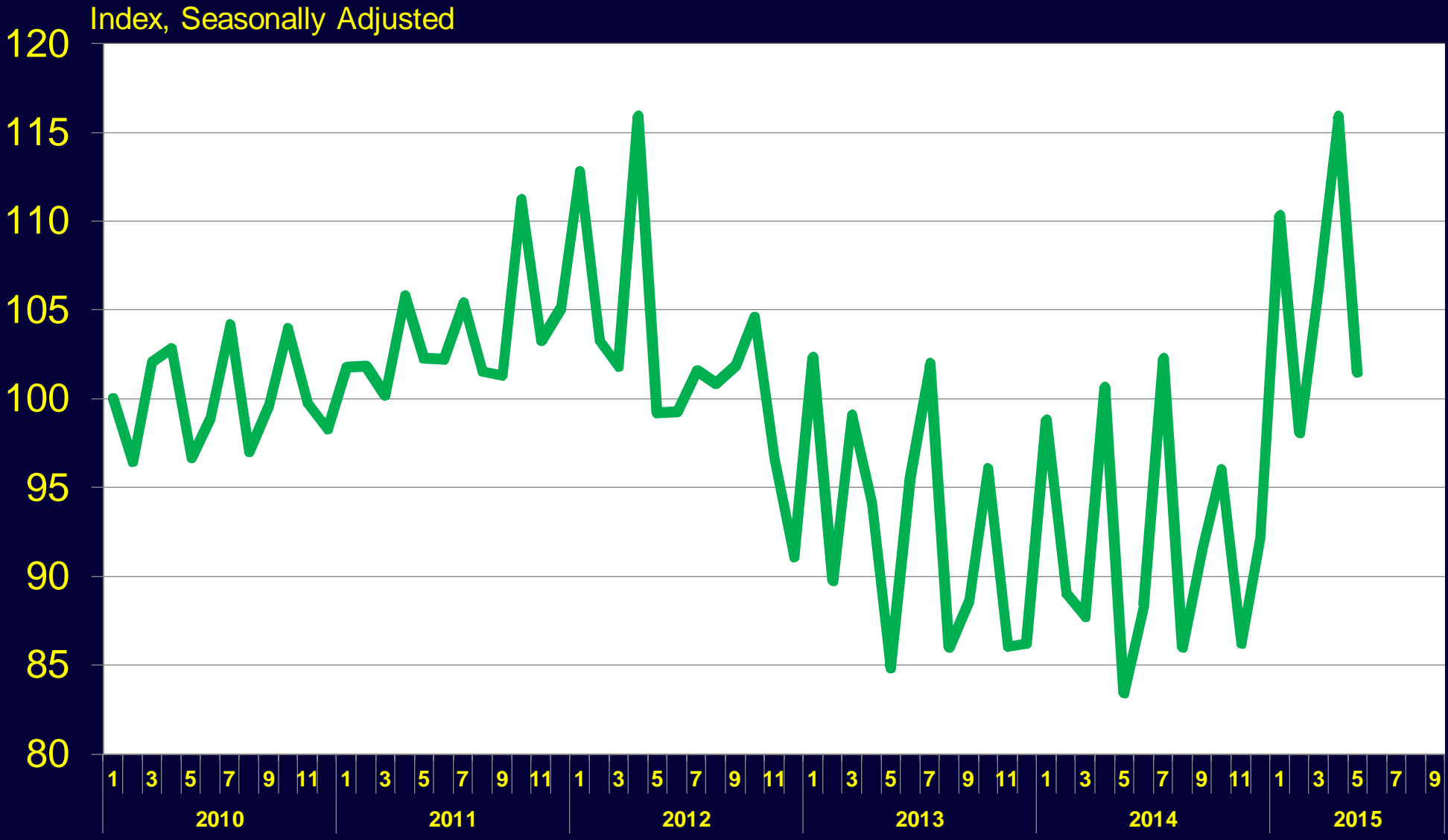
European Production - Aircraft, Spacecraft & Related Equipment



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



European Production - Irradiation, Electromedical & Electrotherapeutic Equipment

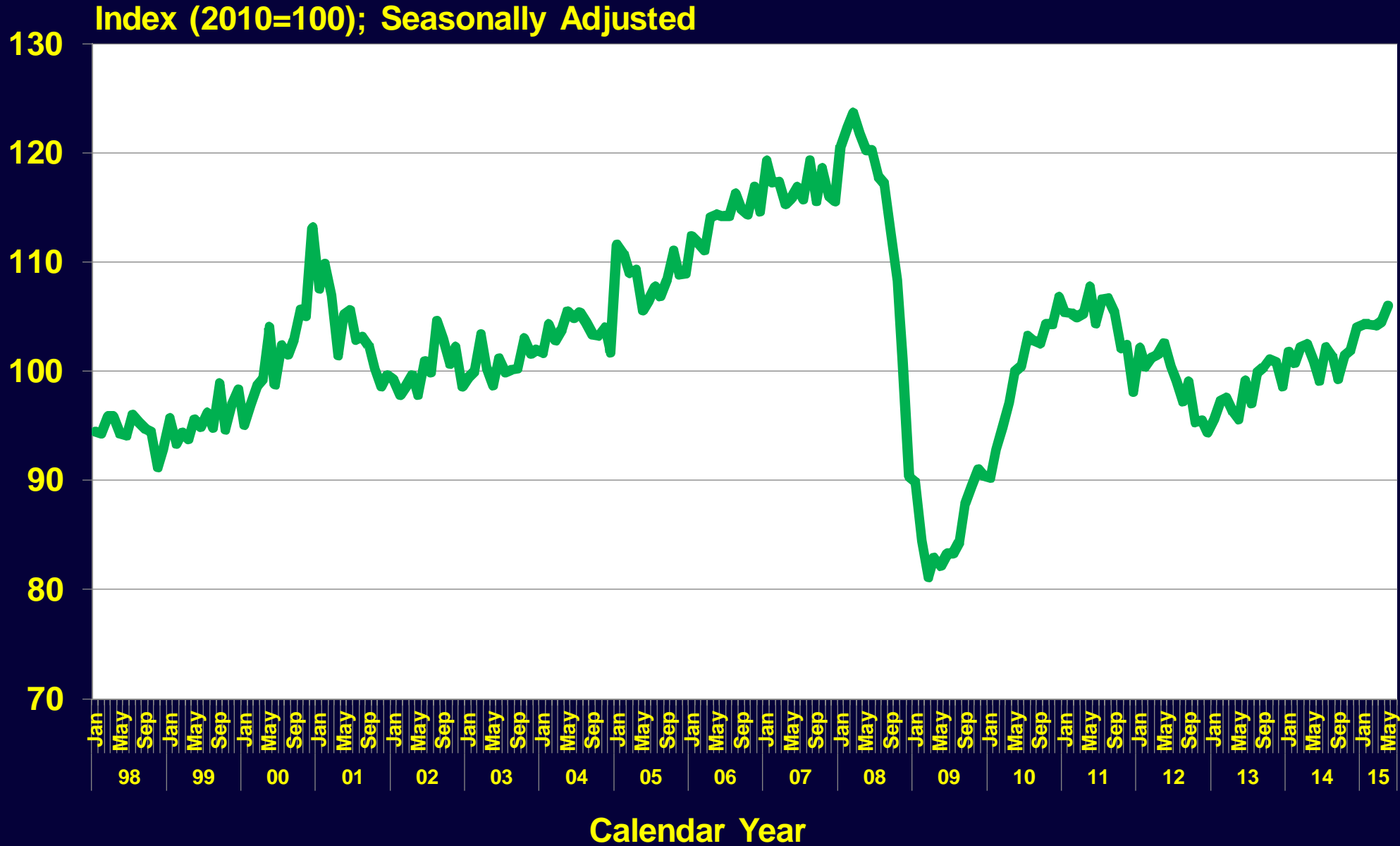


Eurostat, C266 category, EU 27 countries

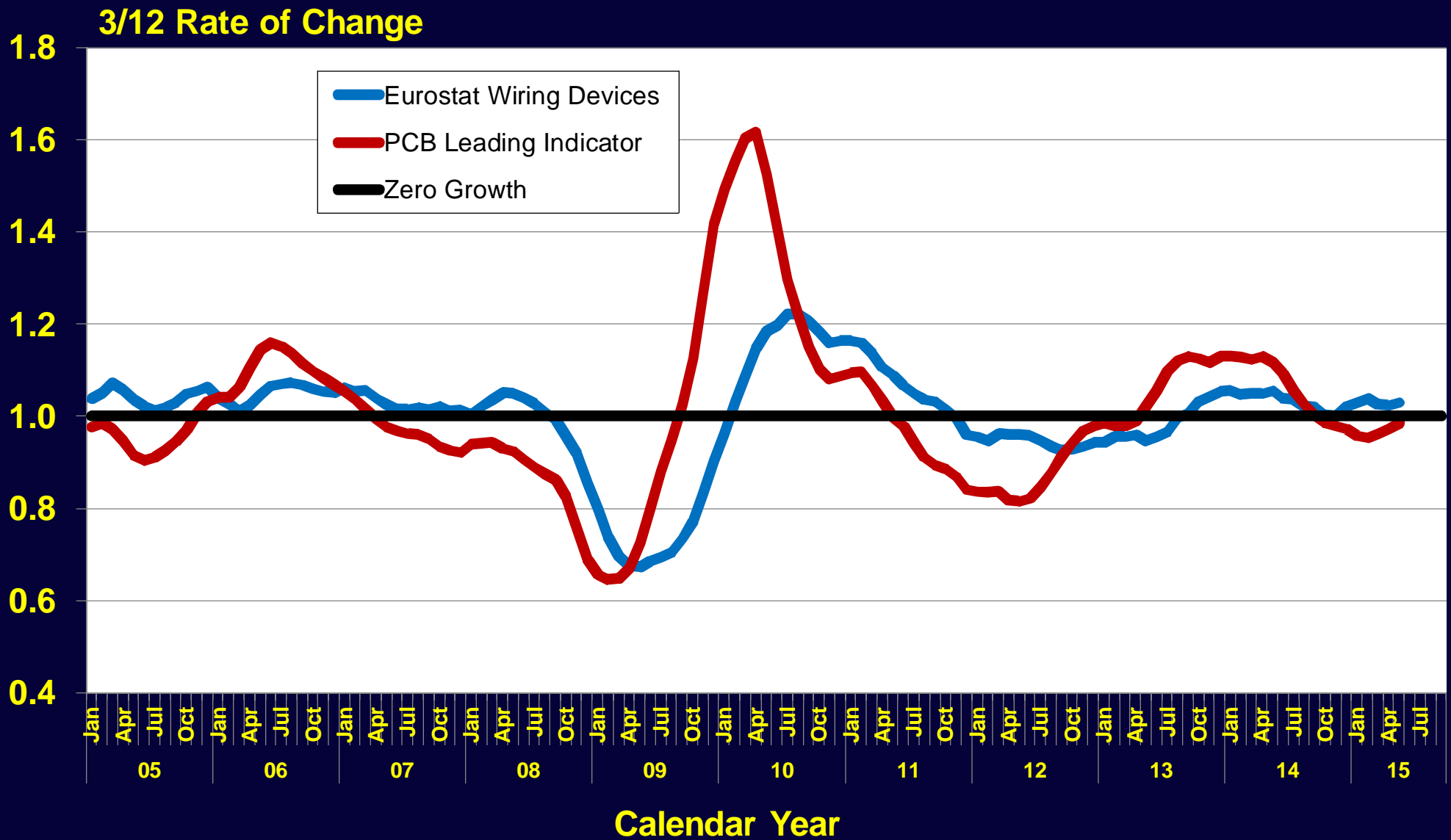
European Loaded Electronic Board Production



European Electronic Wiring Devices



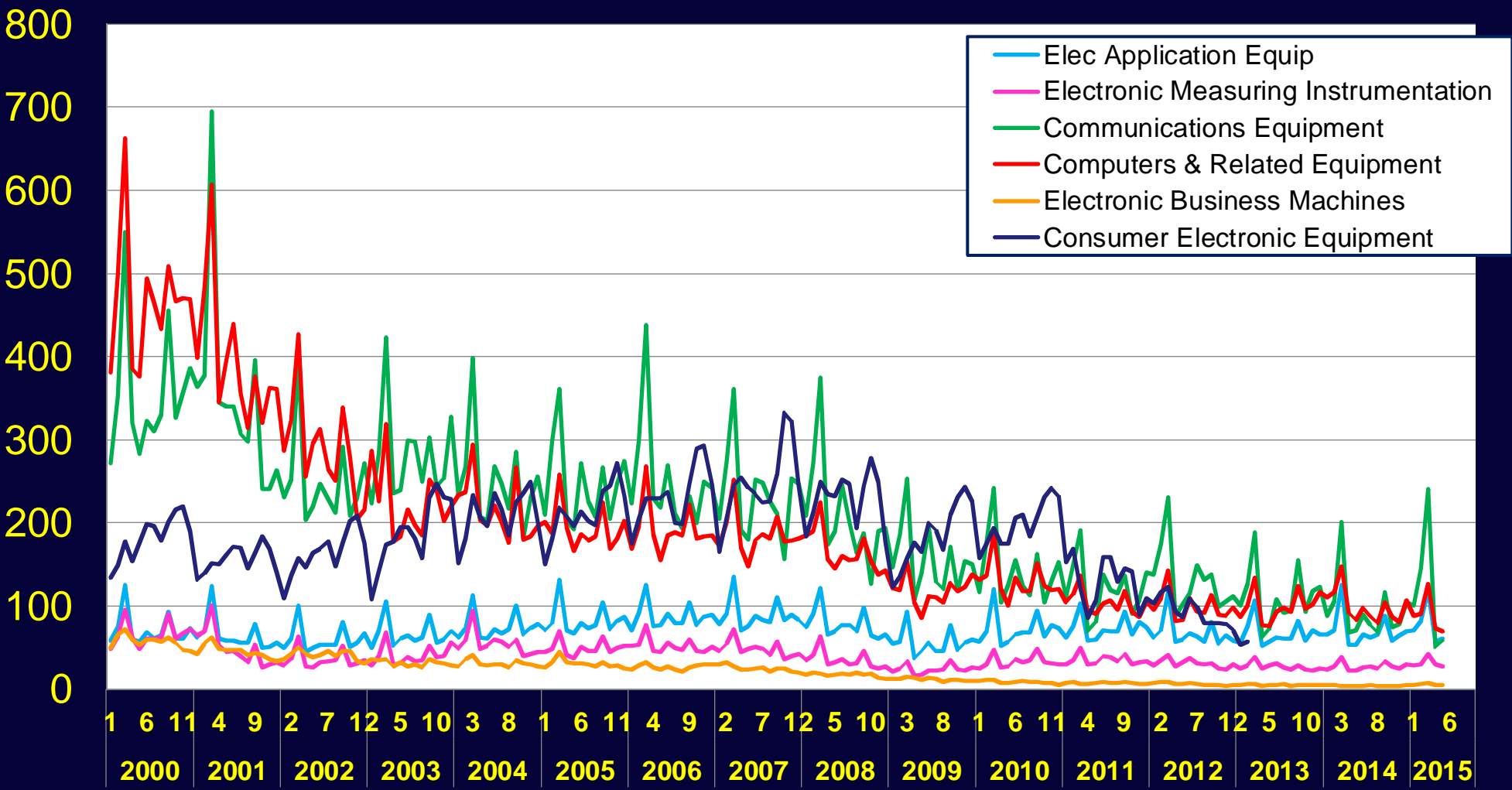
Europe PMI Leading Indicator vs. Europe Wiring Devices



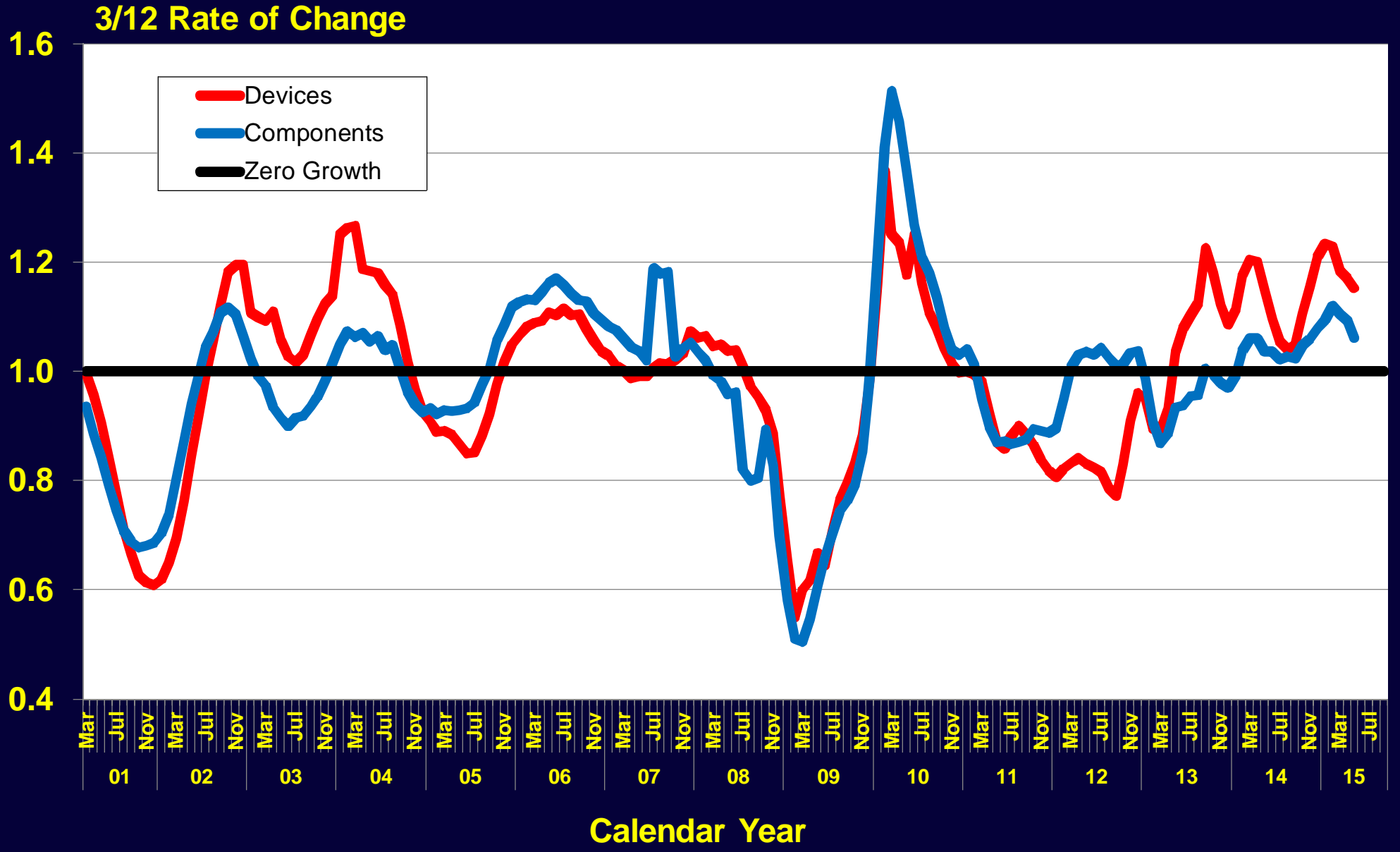
Source: Custer Consulting Group

Japan Electronic Equipment Production by Month 2000 to Present

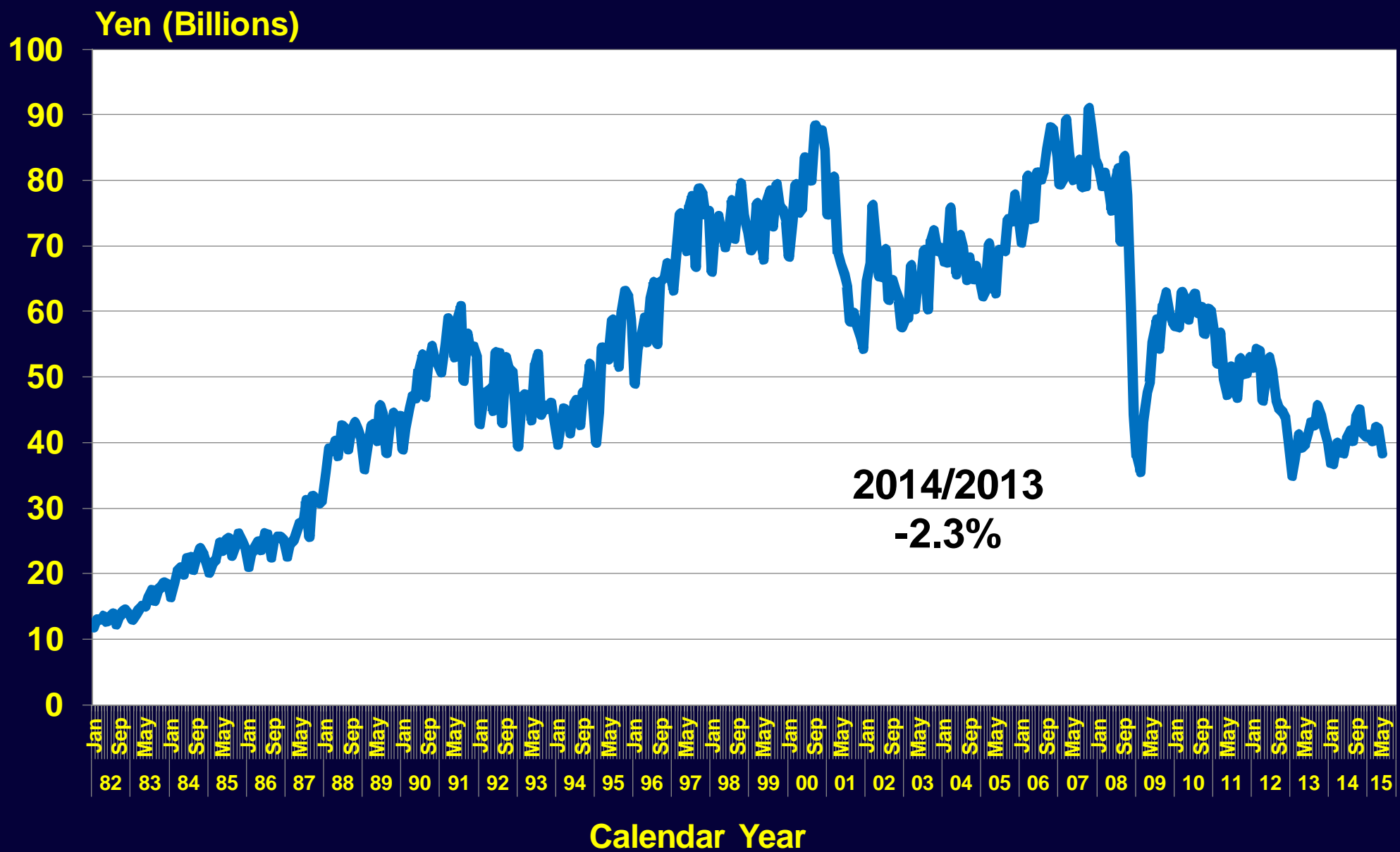
Yen Billion



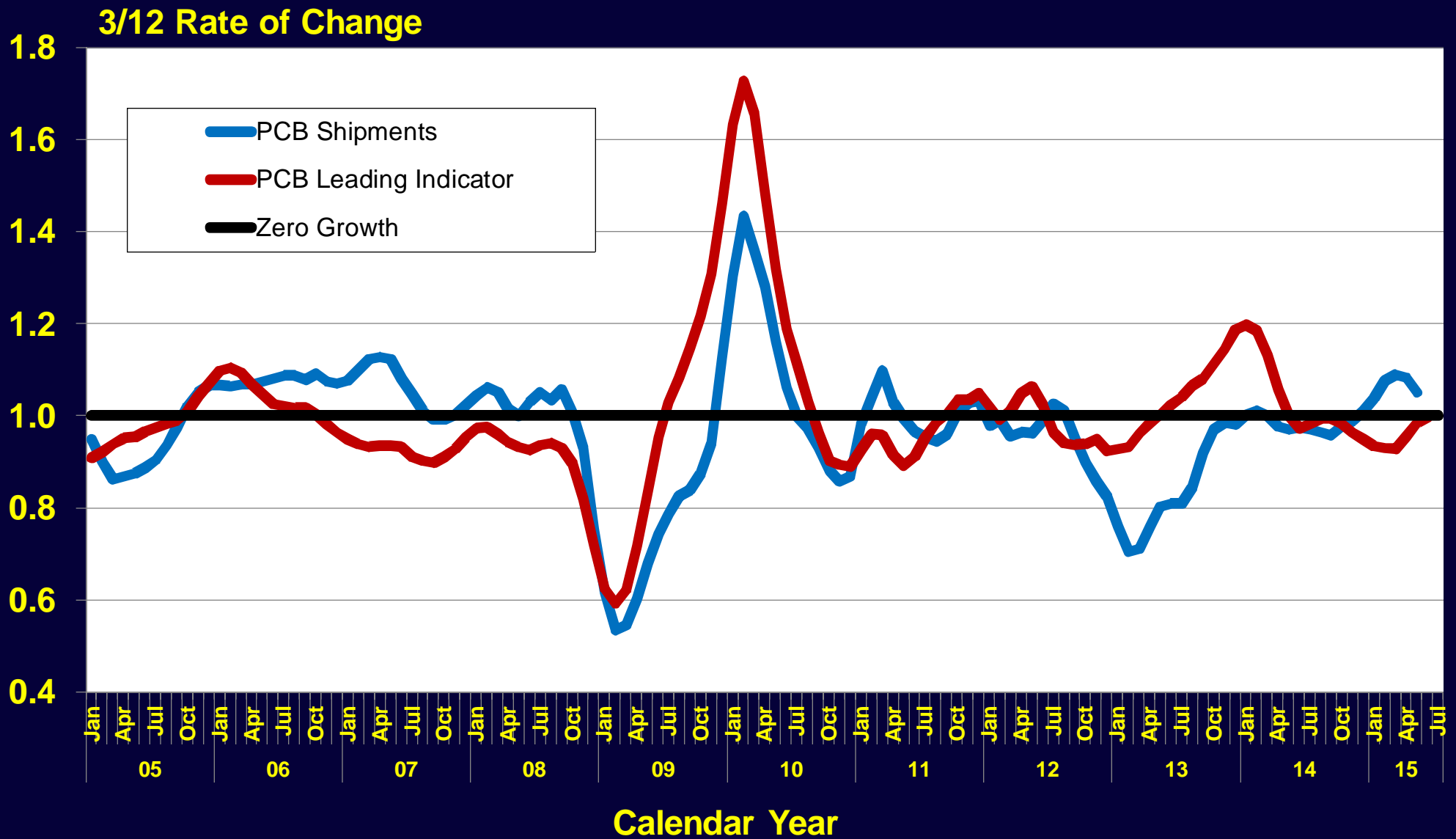
Japanese Electronic Component & Device Production



Japan PCB Shipments

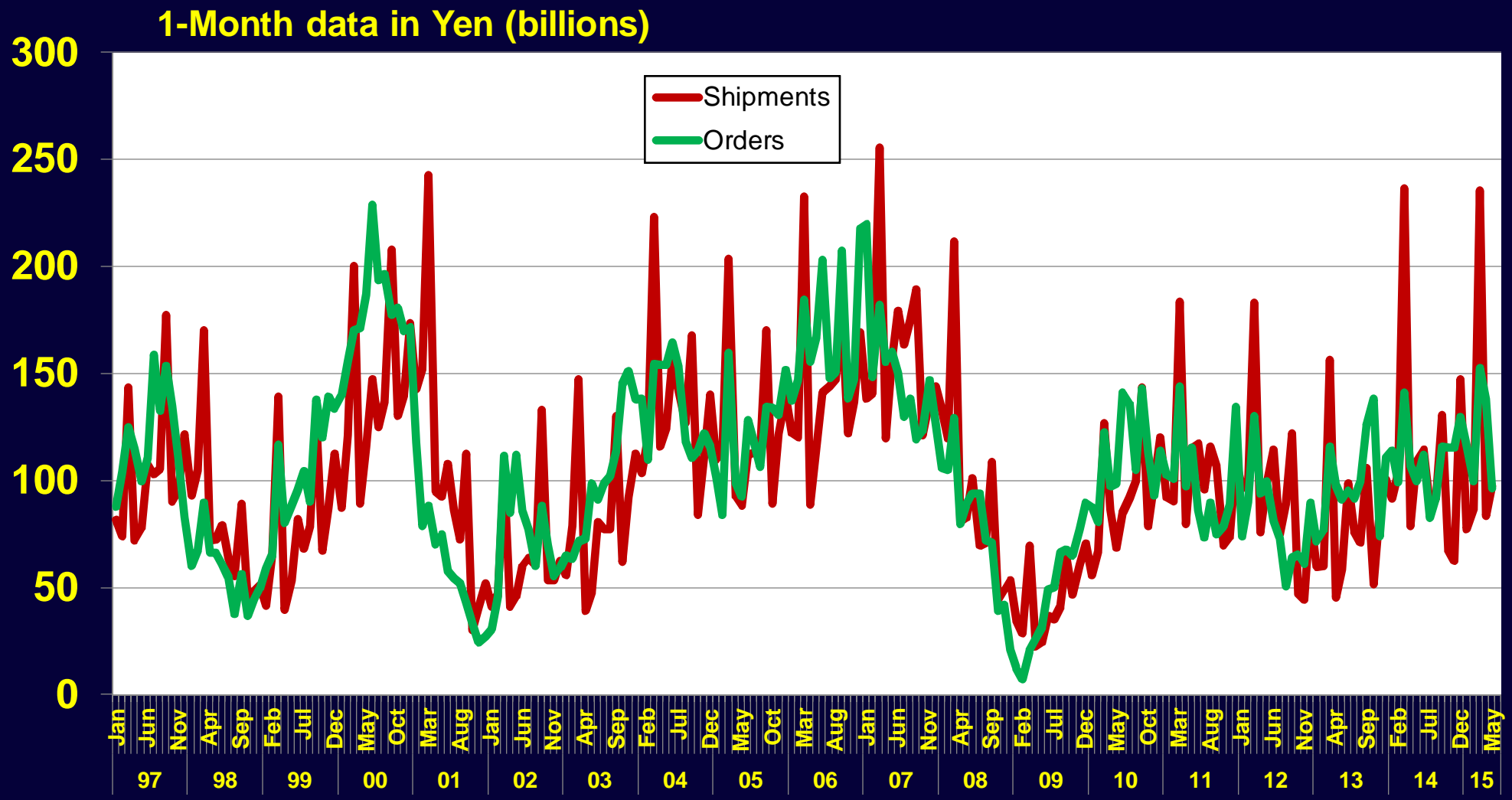


Japan PMI PCB Leading Indicator vs. Japan PCB Shipments



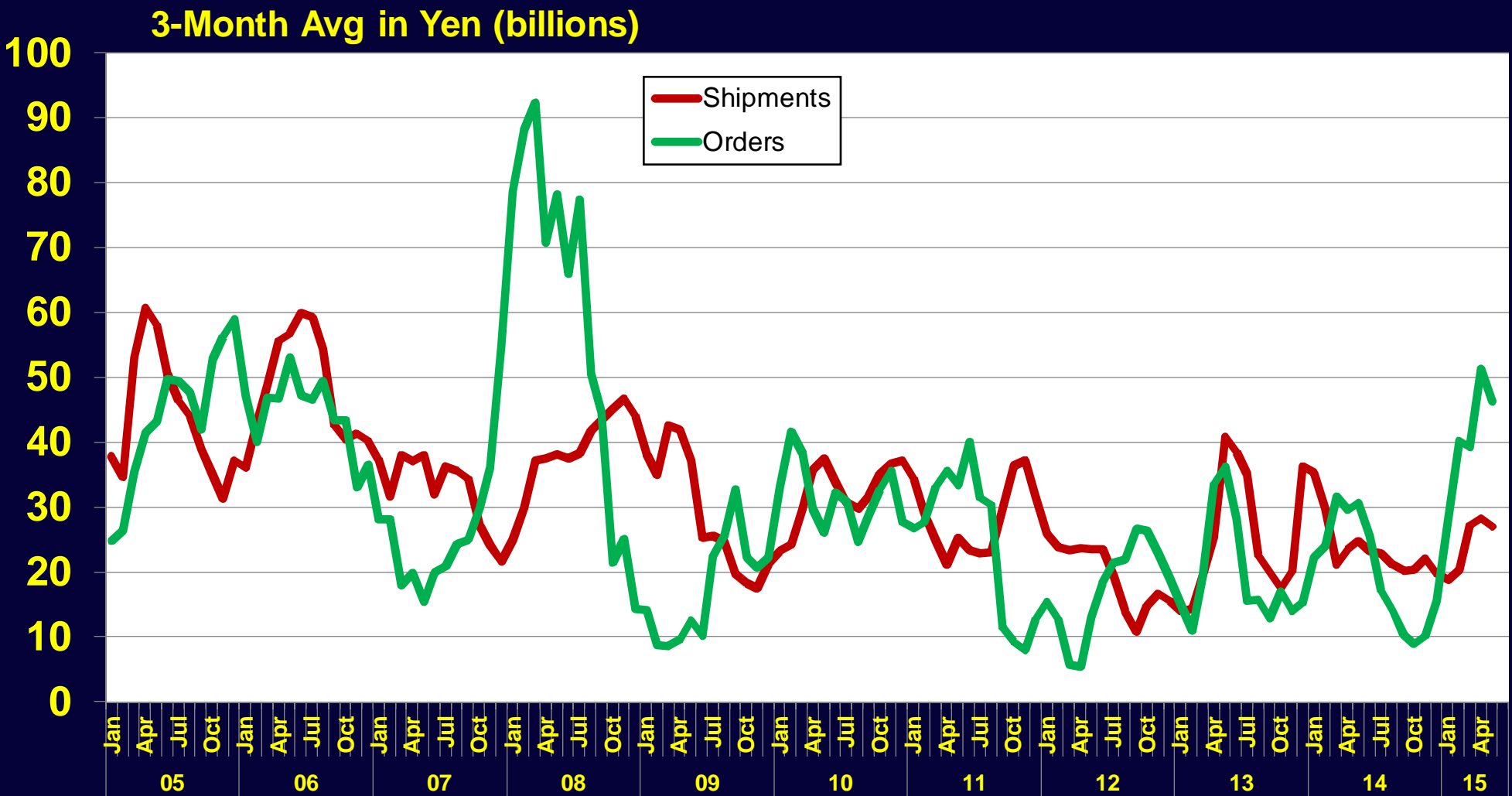
Source: Custer Consulting Group

Japanese Semiconductor Equipment Global Shipments & Orders



SOURCE Semiconductor Equipment Association of Japan; www.seaj.or.jp/english/

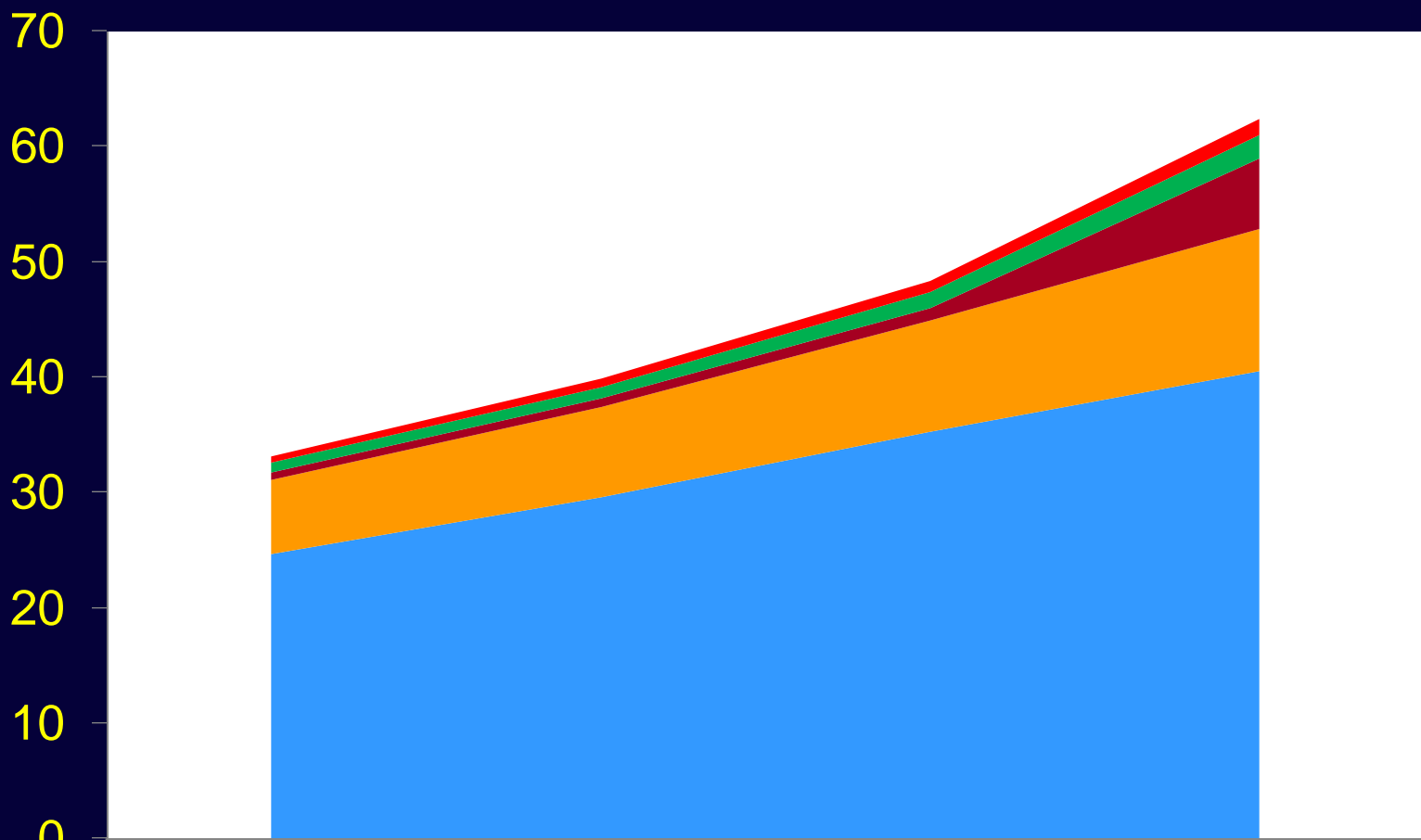
Japanese Flat Panel Display Equipment Global Shipments & Orders



SOURCE Semiconductor Equipment Association of Japan; www.seaj.or.jp/english/

Revenue for IoT Subsystems

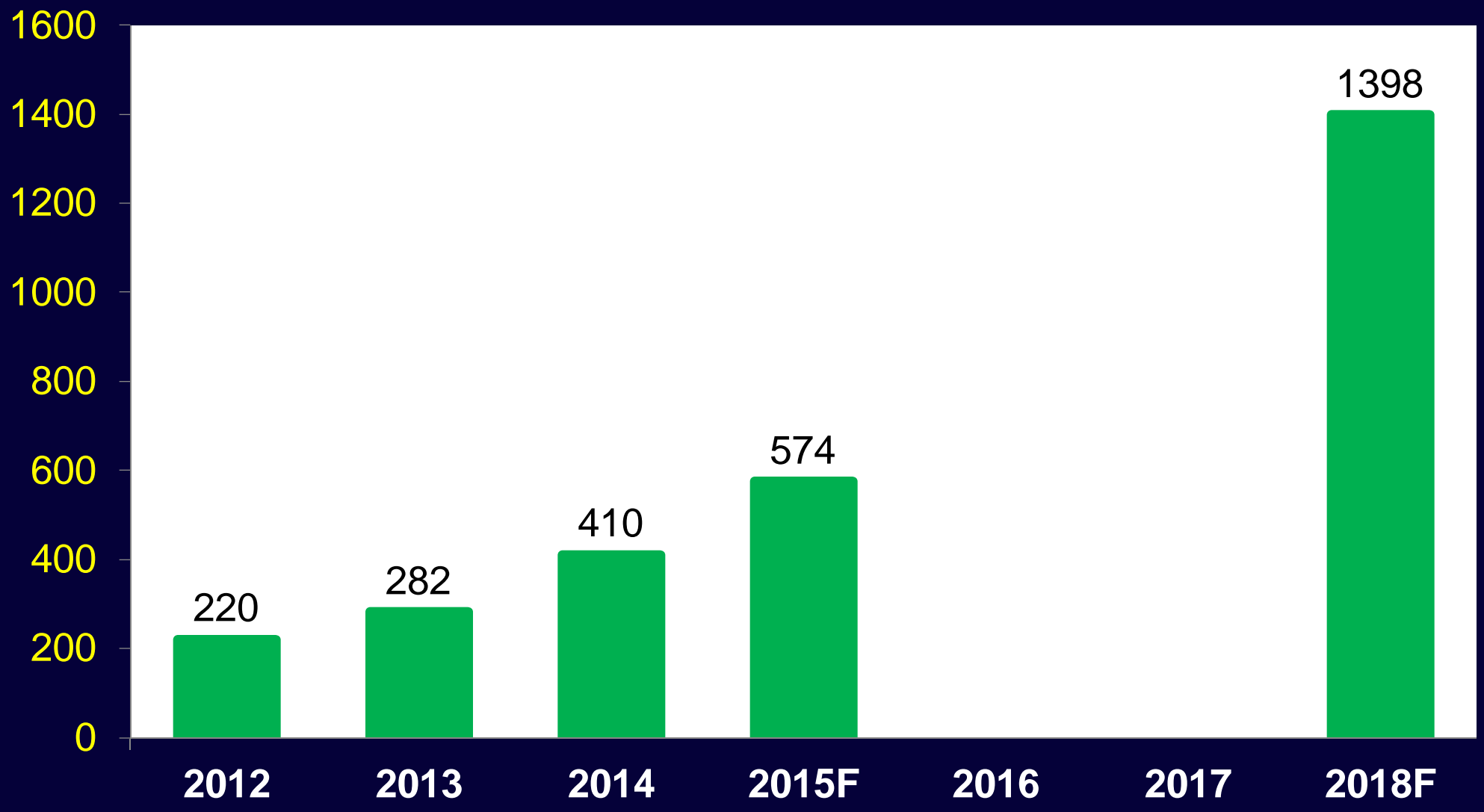
US\$ (Billions)



	2012	2013	2014	2015F
■ Connected Homes	0.6	0.7	1.0	1.4
■ Connected Vehicles	0.8	1.0	1.4	2.0
■ Wearable Systems	0.7	0.8	1.1	6.1
■ Industrial Internet	6.4	7.8	9.6	12.4
■ Connected Cities	24.7	29.6	35.3	40.5

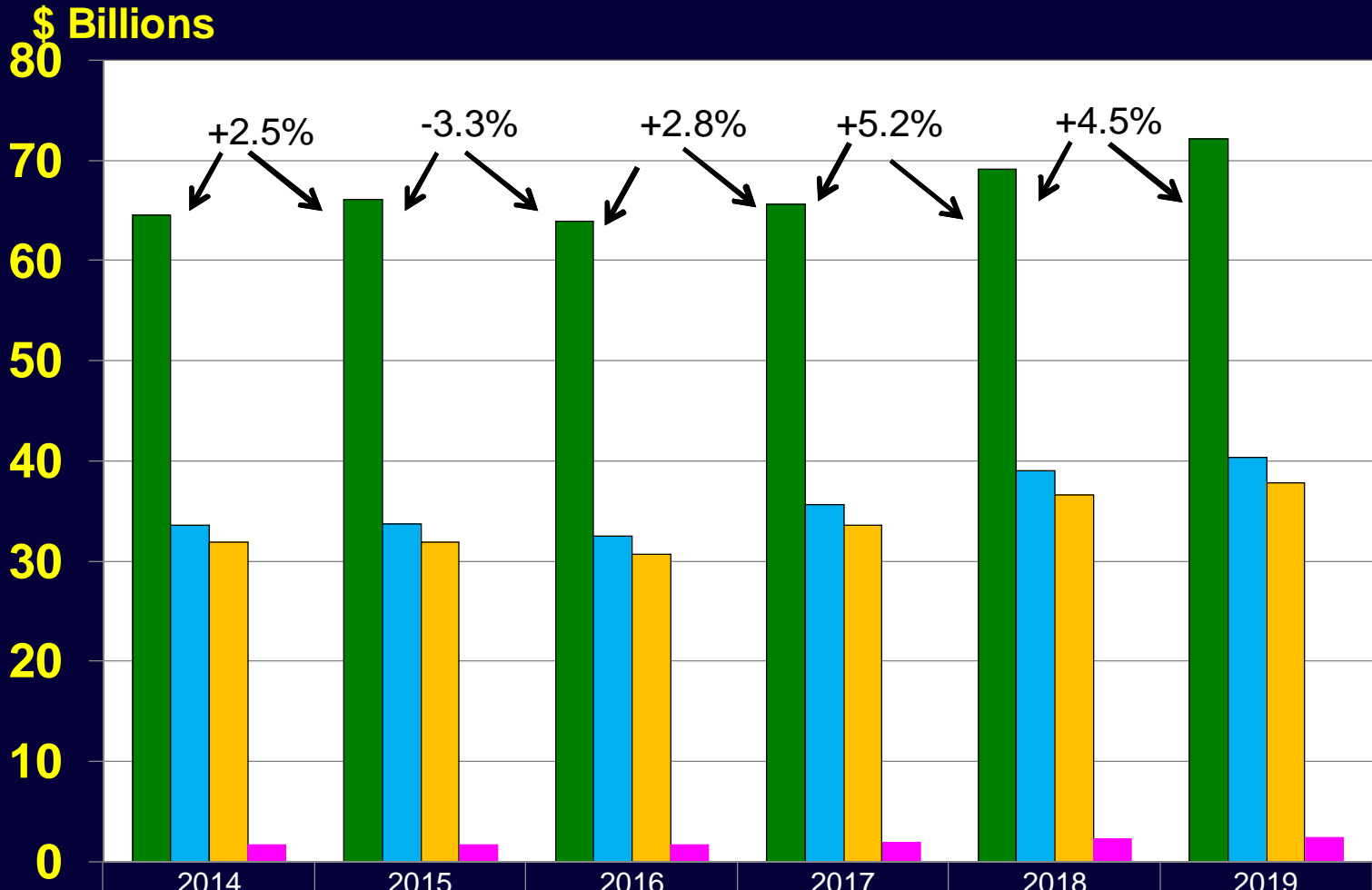
New Connections to Internet of Things

Units (Millions)



World Semiconductor Capital Spending & Equipment Spending Forecast 2014-2019 (\$Billions)

20150714



	2014	2015	2016	2017	2018	2019
■ Semiconductor Capital Spending	64,570	66,157	63,952	65,733	69,152	72,237
■ Wafer-Level Manufacturing Equipment	33,684	33,727	32,533	35,677	39,072	40,355
■ Wafer Fab Equipment	31,953	31,904	30,732	33,634	36,652	37,844
■ Wafer-Level Packaging & Assembly Equipment	1,731	1,823	1,800	2,042	2,420	2,511

U.S. Industrial Production

Index (2007=100)

IP

