

CONSUMER ELECTRONICS



INTRODUCTION

The electronic equipment & instruments industry consists of the total revenues generated by technology distributors, electronic equipment manufacturers and through the OEM contract services of the electronic manufacturing services provider.

Key Facts:

Market Value

The global electronic equipment and instruments industry grew by 2.3% in 2008 to reach a value of \$626.4 billion.

Market Value Forecast

In 2013, the global electronic equipment and instruments industry is forecast to have a value of \$840.5 billion, an increase of 34.2% since 2008.

Market Segmentation I

Electronic equipment manufacturers segment has the largest share of the global electronic equipment and instruments industry, holding 47% of the industry's value.

Market Segmentation II

Asia-Pacific accounts for 34.9% of the global electronic equipment and instruments industry's value.

Market Share

Ingram Micro accounts for 5.5% of the global electronic equipment and instruments industry's value.

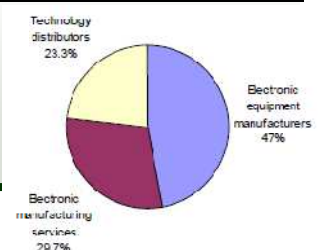
HISTORY

- The Global **electronic information industry** has grown rapidly for the past 20 years since the liberalization of the economy under the national strategic policy of accelerating the "informatization" of its development.

SUB SECTIONS OF THE INDUSTRY

1. Electronic equipment manufacturers
2. Electronic manufacturing services
3. Technology distributors

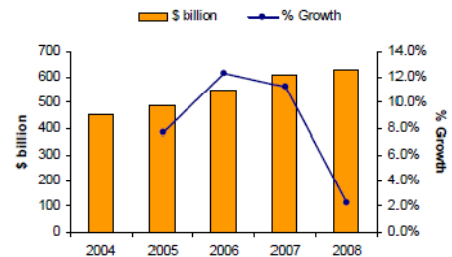
INDUSTRY OPERATIONS



- Electronic equipment manufacturers segment has the largest share of the global electronic equipment and instruments industry, holding 47% of the industry's value. Electronic manufacturing services segment holds a further 29.7% of the industry's revenues.

PAST PERFORMANCE

- The global electronic equipment and instruments industry grew by 2.3% in 2008 to reach a value of \$626.4 billion.
- The compound annual growth rate of the industry in the period 2004-2008 was 8.3%.



CURRENT PERFORMANCE

- The 2008 showed significant drop in growth, which is expected to be followed by slow but steady recovery towards 2013.
- The global electronic equipment and instruments industry generated total revenues of \$626.4 billion in 2008, representing a compound annual growth rate (CAGR) of 8.3% for the period spanning 2004-2008. In comparison, Americas and European industries grew in the same period to reach respective values of \$190.9 billion and \$168.2 billion.
- The electronic equipment manufacturing was the dominant segment in 2008, generating \$294.5 billion for 2008, equivalent to 47% of the industry's overall value.
- The electronic manufacturing services segment generated revenues of \$186 billion in 2008, equating to 29.7% of the industry's value.

FUTURE PREDICTION

The performance of the industry is forecast to decelerate, with an anticipated CAGR of 6.1% for the five-year period 2008-2013, which is expected to drive the industry to a value of \$840.5 billion by the end of 2013.

CHALLENGES

- Players are generally dependent on one or a limited number of suppliers for some components.
- Companies require market-focused expertise and capabilities in design and engineering, raising barriers to entry for potential new companies

TOP CONTRIBUTORS

- Ingram Micro accounts for 5.5% of the global electronic equipment and instruments industry's value.
- Flextronics holds a further 4.4% of the industry's global value

