



Western - Central – Eastern Europe 25 National European Connector Markets

Bishop & Associates has just released a new six-chapter research report analyzing the European Connector Market. This report provides a comprehensive analysis of the market detailing connector consumption by country, with details by end-use equipment sector, and connector product category. Sales are provided for the years 2006, 2007, and a 2012 forecast.

This report supplies detailed statistics for the following 25 countries:

Member States of the European Union Using the Euro Currency		Member States of the European Union Not Using the Euro Currency		Country's not part of the European Union	
Austria	Italy	Hungary	Bulgaria	Ukraine	Norway
Belgium	Netherlands	Czech Republic	Estonia	Turkey	Switzerland
Finland	Portugal	Poland	United Kingdom		
France	Spain	Slovakia	Denmark		
Germany	Slovenia	Romania	Sweden		
Ireland					

The developments in international markets and electronic production have become very dynamic in the past two decades. From the age of internationalization in which manufacturers set up quasi permanent locations abroad we moved in to the age of globalization which involves moving production locations all over the globe to those areas where end-use markets develop or where production is most cost efficient. The speed at which these changes are taking place is increasing and specialized production companies (EMS providers) have emerged to take over (part of) this effort from OEMs.

The results is that tracking the connector market performance has become equally dynamic and market volumes by location are much more volatile than several decades ago. This means that market research data by country will become outdated faster and has to be updated more frequently.

In an attempt to underline the changes that have taken place in Europe the past two decades on political, economical and social levels Bishop & Associates has now consolidated all European connector markets from Western Europe to Central and Eastern Europe into one concise research report.

Although is it clear that the market dynamics are not the same between Western Europe and Central and Eastern Europe (the CEE region), we can, at the same time, no longer separate these regions in terms of political, economical and social development. Most CEE countries in this report are now part of the European Union and some are getting ready to adopt the Euro. Slovenia already has.

Historic Growth

The European connector market grew by an average of +4.8% per year (CAGR) between 2002 and 2007 measured in local currency (Euro). Measured in US Dollar this would mean a CAGR of 12.5% in the five-year period from 2002-2007.

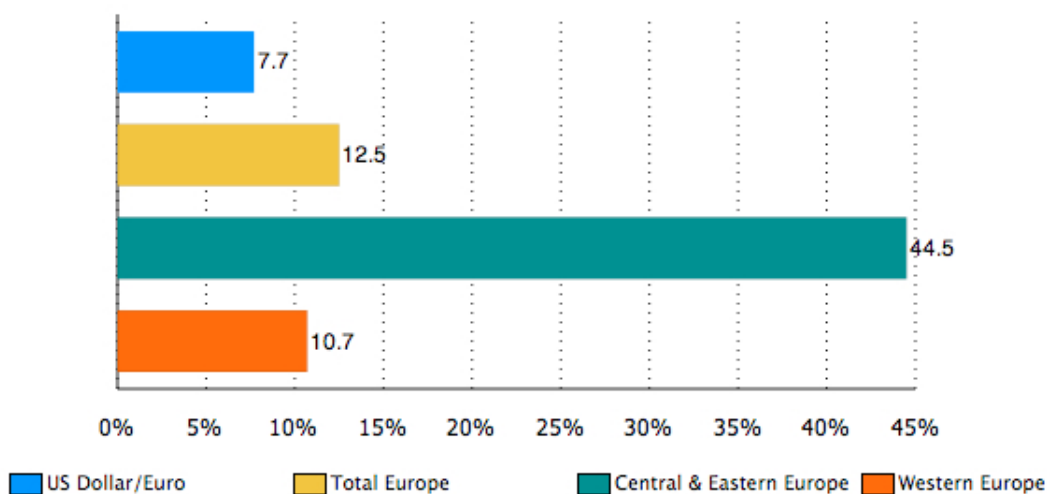
In 2007, the European Connector Market was the largest global connector market (by region).

Region	2007	Market Share
North America	\$9,897.6	23.1%
Europe	\$11,405.5	26.6%
Japan	\$6,759.8	15.8%
China	\$7,022.5	16.4%
Asia Pacific	\$4,872.0	11.4%
ROW	\$2,863.5	6.7%
Total	\$42,820.9	100.0%

\$ Millions

Most countries in Central and Eastern Europe countries achieved higher than average growth of their national connector markets. Western European countries have grown at a much slower pace which effectively resulted in a decline of some of their national connector markets when measured in local currency. This illustrates that the European Connector Market is developing at two different speeds.

European Connector Market CAGR by European Region 2002-2007



Outlook

On a macro-economic and global level we identify following drivers for the next 5 years:

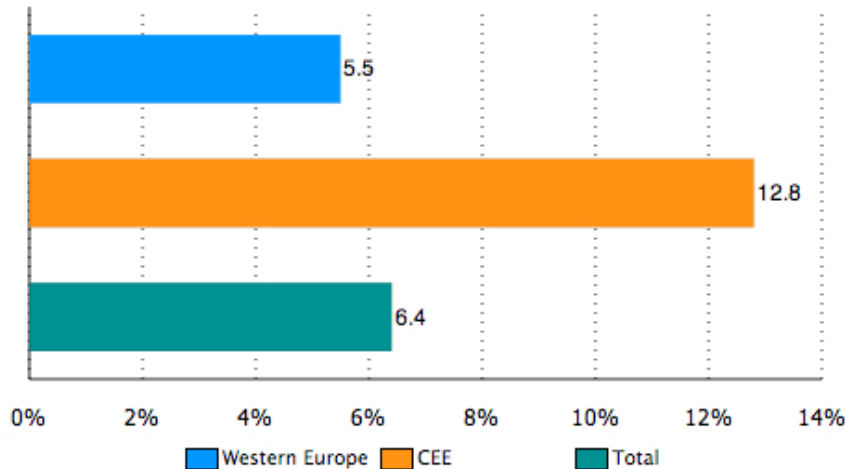
- Changing (economic) power structures in the world (China, India, Brazil, Russia) – based foremost on economical and political power mixed with an increasing demand for natural resources and energy.
- The last major push for migration of existing manufacturing plants reaching (temporary) equilibrium within 3-5 years. New plants will be built wherever they are best placed to compete or best-placed service the (local) market.
- Continued high prices for natural resources and energy (oil, metals).
- Exchange rate fluctuations for world currencies: US\$ vs. Euro, US\$ vs. Chinese Yuan (RMB), Yen. In turn financial markets and other macro-economic factors influence these.
- Increased awareness and support for environmentally friendly innovations such as renewable energy sources, recycling and environmental sciences.

Technology drivers for the next five years will include:

- Green' Engineering – environmentally friendly engineering and innovation.
- Complete integration of communication, computer and consumer electronics with spin-offs from and into all other sectors: automotive, medical, transportation, military & aerospace, business & office and industrial. Innovations in the communication sector are driven by mobile and wireless applications. VOIP will grow exponentially. Consumer electronics is driven by integration of video, audio and navigation combined with services on demand over IP networks. Bandwidth requirements will continue to grow and possibly trigger an exponential growth of fiber optic networks and Fiber to the Home (FTTH).
- Miniaturization combined with high-speed signal transfers: advanced functionality using smaller PCB footprints and (possibly) higher power consumption – thermal engineering will remain a key factor.
- Networking the 'world' by embedding chips capable of wireless communication into anything from objects to animals or even human bodies giving information about anything almost anywhere at virtually no cost. RF-ID could play an important role in this. For industrial applications Ethernet will further develop as the de-facto standard.
- Other innovations in the field of home and building automation, robotics, MEMS technology and use of new materials.

The Outlook for the European Connector market for 2008 has to be split in to an outlook for the CEE region and one for Western Europe. Overall we expect the European connector market to grow with a CAGR of 6.4% until 2012.

2007-2012 European Connector Market CAGR by Region



Five-Year Forecast by Market Sector

Manufacturing of Computer, Communication and Consumer electronics has moved on a large scale out of Western Europe to China/Asia but also to Central and Eastern Europe. At the same time the automotive industry is setting up production facilities further East in Slovakia, the Czech Republic and Russia.

Some other equipment sectors have been less affected by production shifts. Mainly 'protected' markets such as Military/Aerospace equipment, Instrumentation and Control equipment, Medical Equipment and to a certain degree Industrial Equipment as production series are usually smaller and systems more complex. Systems with high IP content are usually kept close to home.

At the same time new growth markets are emerging. Markets for Renewable Energy (wind power, solar energy) and Waste & Water Treatment are booming in Western Countries (including the USA). Besides the PCB and Rectangular I/O connectors these will become lucrative markets for Photovoltaic, Heavy Duty and Power connectors.

The European industry will also continue to perform well in the transportation sector as trains, planes and heavy vehicles become more sophisticated, complex and require advanced engineering capabilities. Emerging economies in Asia and India will continue to support the demand for capital goods like machinery, plant equipment and modern transportation equipment. Some of this equipment (or the mechanical parts) will be build closer to the end user, but sophisticated electronics and control equipment will be designed and produced in Europe for some years to come

Medical equipment production continues to grow strong. It is a sector in which European companies can compete as it is highly specialized and often does not involve mass production.

The automotive industry, by far the biggest connector market sector in Europe, will further evolve and the production capacity build-up will continue in Central and Eastern Europe while the production of new vehicles in Western Europe is not likely to increase. The electronics content in vehicles in Europe will however further increase resulting in a higher connector market volume.

The communication sector is driven by wireless and mobile applications, which may lead to booming business in specific niches. If combined with increased throughput, bandwidth requirements and Fiber to the Home (FTTH) developments, the market for RF and Fiber Optic connectors also looks promising. Especially since FOC and RF connectors are also used in the growing Medical sector.

As expected the computers and peripherals connector market will further decline in Western Europe over the next five years. This decline is partly offset by the growth of this sector in the CEE region. The medical equipment sector will remain the fastest growing market sector. The transportation (non-auto) sector is also growing at an above average rate, with a CAGR of 7.7%.

The following table of contents shows the detail provided in this new report.

Table of Contents

Chapter 1 - Introduction To The European Connector Market

Definitions: How We Define Europe
 Russia
 Exchange Rates US Dollar Versus Euro
 Historic Average (365 Days) Exchange Rates Euro / US Dollar 2002-2007
 Historic Monthly Average Exchange Rates Euro / US Dollar 2003-2007
 European Currencies And Their Historic Average (365 Days)
 Exchange Rates Versus US Dollar
 Exchange Rate Evolution Against The US\$2006-2007
 World Connector Market by Region 2002-2007
 World Connector Market By Region In US\$ - 2002-2007
 Connector Market Share By Region – 2007
 Historic European Market Growth 2002-2007
 Year-Over-Year Growth European Connector Market 2000-2007
 Western Europe vs. Central & Eastern Europe 2002-2007
 The European Connector Market At Two Different Speeds 2002-2007
 European Connector Market by Country
 Connector Market Growth by Country 2006-2007
 Historic European Connector Market Growth 2002-2007 by End-use Equipment1
 European End-Use Equipment Sector Connector Sales 2002-2006-2007
 Market and other 'winners' are the Industrial and Medical sectors.
 European Connector Market Growth 2002-2007 by Product Type1
 European Connector Sales By Product Type 2002-2006-2007

Chapter 2 - European Connector Market - 5-Year Forecast 2007-2012

World Connector Market by Region – 5-Year Forecast 2007-2012
 Five-Year CAGR World Connector Market By Region 2007-2012
 Five Year CAGR European Connector Market 2007-2012
 Five Year CAGR European Connector Market 2007-2012 by End-use Equipment
 Five Year CAGR European Connector Market 2007-2012 by Product Type
 European Connector Market by Country – 5-Year Forecast 2007-2012
 The Great Divide: East vs. West
 European Connector Market by Country – 5-Year CAGR 2007-2012

Chapter 3 - Market Overview And Dynamics - European Connector Market

Industry And Production Base – Some Facts
 Automotive Industry

Motor vehicle production in Western Europe (EU15) - 2006
 Motor vehicle production in Central and Eastern Europe - 2006
 CEE Share of European Motor Vehicle Production 2003- 2007
 EMS Providers on the move
 PCB manufacturing
 2006 share of the global PCB market by origin of PCB manufacturer
 Market Shifts and Production Transfers
 Industries that so far remained in 'Western' locations:
 Industries subjected to further 'dissection' in the near future:
 GDP Growth and Connector Market Share by Country
 Real GDP growth 2006-2007 and Forecast (April 2008) for 2008 - 2009
 Industrial GDP and Connector Market Growth
 Patent applications by country in 2007
 Economic Outlook 2008
 Connector Market Index: Potential, Size and Growth
 Semiconductor and Connector Historic European Sales Trends
 Legislation Driving Intellectual Property & Technological innovation
 Prices & lead times
 Sales Channels: Distribution – EMS providers - OEM
 Competitiveness, Structural Reform and Government Leadership
 Further Expansion of the European Union

Chapter 4 - Connector Manufacturers Servicing the European Market

European Market Shares by Company
 2006 European Market Share Estimates By Connector Manufacturer
 Top 50 Connector Manufacturers Euro (2006 sales)
 Acquisitions
 Market Sectors Served by Company
 Market Sectors Served: Combined Company Sales => 80% Total Company Sales

Chapter 5 - European Connector Market by Country

Introduction
 Austria
 Country Data Austria
 Austrian Connector Market
 Austrian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Austrian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Austrian Connector Market by End-use Equipment
 2006-2007-2012 Austrian Connector Market by Product Type
 2006 Connector Type/End-Use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment

Belgium
 Country Data Belgium
 Belgian Connector Market
 Belgian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Belgian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Belgian Connector Market by End-use Equipment
 2006-2007-2012 Belgian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Denmark
 Country Data Denmark
 Danish Connector Market
 Danish Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Danish Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Danish Connector Market by End-use Equipment
 2006-2007-2012 Danish Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Finland
 Country Data Finland
 Finnish Connector Market
 Finnish Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Finnish Connector Market by End-use Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Finnish Connector Market by End-use Equipment
 2006-2007-2012 Finnish Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 France
 Country Data France
 French Connector Market
 French Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 French Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 French Connector Market by End-use Equipment
 2006-2007-2012 French Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Germany
 Country Data Germany
 German Connector Market
 German Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 German Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 German Connector Market by End-use Equipment
 2006-2007-2012 German Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Ireland
 Country Data Ireland
 Irish Connector Market
 Irish Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Irish Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Irish Connector Market by End-use Equipment
 2006-2007-2012 Irish Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment

Italy
 Country Data Italy
 Italian Connector Market
 Italian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Italian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Italian Connector Market by End-use Equipment
 2006-2007-2012 Italian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Netherlands
 Country Data Netherlands
 Dutch Connector Market
 Dutch Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Dutch Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Dutch Connector Market by End-use Equipment
 2006-2007-2012 Dutch Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Norway
 Country Data Norway
 Norwegian Connector Market
 Norwegian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Norwegian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Norwegian Connector Market by End-use Equipment
 2006-2007-2012 Norwegian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Portugal
 Country Data Portugal
 Portuguese Connector Market
 Portuguese Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Portuguese Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Portuguese Connector Market by End-use Equipment
 2006-2007-2012 Portuguese Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Spain
 Country Data Spain
 Spanish Connector Market
 Spanish Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Spanish Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Spanish Connector Market by End-use Equipment
 2006-2007-2012 Spanish Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Sweden
 Country Data Sweden
 Swedish Connector Market
 Swedish Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Swedish Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Swedish Connector Market by End-use Equipment
 2006-2007-2012 Swedish Connector Market by Product Type
 2006 Connector Type/End-use Equipment

2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Switzerland
 Country Data Switzerland
 Swiss Connector Market
 Swiss Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Swiss Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Swiss Connector Market by End-use Equipment
 2006-2007-2012 Swiss Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 United Kingdom
 Country Data United Kingdom
 British Connector Market
 British Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 British Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 British Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Hungary
 Country Data Hungary
 Hungarian Connector Market
 Hungarian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Hungarian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Hungarian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Poland
 Country Data Poland
 Polish Connector Market
 Polish Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Polish Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Polish Connector Market by End-use Equipment
 2006-2007-2012 Polish Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Czech Republic
 Country Data Czech Republic
 Czech Connector Market
 Czech Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Czech Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Czech Connector Market by End-use Equipment
 2006-2007-2012 Czech Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Slovakia
 Country Data Slovakia
 Slovak Connector Market
 Slovak Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Slovak Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Slovak Connector Market by End-use Equipment
 2006-2007-2012 Slovak Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment

Estonia
 Country Data Estonia
 Estonian Connector Market
 Estonian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Estonian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Estonian Connector Market by End-use Equipment
 2006-2007-2012 Estonian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Turkey
 Country Data Turkey
 Turkish Connector Market
 Turkish Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Turkish Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Turkish Connector Market by End-use Equipment
 2006-2007-2012 Turkish Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Romania
 Country Data Romania
 Romanian Connector Market
 Romanian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Romanian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Romanian Connector Market by End-use Equipment
 2006-2007-2012 Romanian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Bulgaria
 Country Data Bulgaria
 Bulgarian Connector Market
 Bulgarian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Bulgarian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Bulgarian Connector Market by End-use Equipment
 2006-2007-2012 Bulgarian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Slovenia
 Country Data Slovenia
 Slovenian Connector Market
 Slovenian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Slovenian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Slovenian Connector Market by End-use Equipment
 2006-2007-2012 Slovenian Connector Market by Product Type
 2006 Connector Type/End-use Equipment
 2007 Connector Type/End-use Equipment
 2012 Connector Type/End-use Equipment
 Ukraine
 Country Data Ukraine
 Ukrainian Connector Market
 Ukrainian Connector Market by End-use Equipment – 2006, 2007 and Five Year CAGR
 Ukrainian Connector Market by Product Type – 2006, 2007 and Five Year CAGR
 2006-2007-2012 Ukrainian Connector Market by End-use Equipment
 2006-2007-2012 Ukrainian Connector Market by Product Type
 2006 Connector Type/End-use Equipment

2007 Connector Type/End-use Equipment
2012 Connector Type/End-use Equipment

Chapter 6 - European Connector Market Overview and Outlook

European Top 5 Countries by Market Sector and Product Type 2007-2012

Computers & Peripherals

2007 Computers & Peripherals

2012 Computers & Peripherals

Business, Retail & Education

2007 Business, Retail & Education

2012 Business, Retail & Education

Instrumentation

2007 Instrumentation

2012 Instrumentation

Transportation (non-auto)

2007 Transportation Equipment

2012 Transportation Equipment

Medical Equipment

2007 Medical Equipment

2012 Medical Equipment

Telecommunication & Data communication Equipment

2007 Data/Telecom Equipment

2012 Data/Telecom Equipment

Industrial Equipment

2007 Industrial Equipment

2012 Industrial Equipment

Automotive Equipment

2007 Automotive Equipment

2012 Automotive Equipment

Military/Aerospace Equipment

2007 Military Equipment

2012 Military Equipment

Consumer Electronics

2007 Consumer Electronic

2012 Consumer Electronics

Largest Connector Segments By Country, By End-Use Equipment
And Product Type

2007 All Sectors

2012 All Sectors

European Top 5 Countries by Product Type 2007-2012

Top 5 Countries: PCB Connectors 2007-2012

Top 5 Countries: Rectangular I/O Connectors 2007-2012

Top 5 Countries: IC Sockets 2007-2012

Top 5 Countries: RF Coax Connectors 2007-2012

Top 5 Countries: Circular Connectors 2007-2012

Top 5 Countries: Telephone/Telecom Connectors 2007-2012

Top 5 Countries: Fiber Optic Connectors 2007-2012

Top 5 Countries: Terminal Blocks 2007-2012

Top 5 Countries: Heavy Duty Connectors 2007-2012

Top 5 Countries: Power/High Voltage Connectors 2007-2012

Top 5 Countries: Application Specific Connectors 2007-2012

Overview European Connector Market by Country by Product Type
2006-2007-2012

Overview European Connector Market by Country by Equipment
Sector 2006-2007-2012

Overview European Connector Market by Product Type by
Equipment Sector 2006-2007-2012





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European Connector Market

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