



World Computer & Peripheral Market Report

Computer Equipment & Connector Content

Mobile - Desktop - Server - Storage
I/O Peripheral - HPC - LAN - Other

Bishop and Associates has just released the new nine-chapter research report analyzing the World Computer and Peripheral Market. This comprehensive report provides detail on all aspects of the world computer and peripheral market, including connector statistics for the years 2006-2011 (including five-year CAGRs), and projections to the year 2016.

This report analyzes Computers & Peripherals worldwide and their connector usage including:

- ◆ Estimates of equipment & connector volume 2001-2016 in units and dollars.
- ◆ Forecasts by market segment and region of the world.
- ◆ Equipment segments include mobile, desktop, server, HPC, storage, LAN, peripheral equipment and other. Categories include:
 - PDA/communicator, notebook/tablet, desktop, motherboard, peripheral equipment, entry level/blade server, midrange, enterprise server, mainframe, workstation, high performance & technical computers (HPC), SAN/NAS/SAS HDD storage, desktop LAN equipment & boards, single board/embedded computers, and others.
- ◆ Connector volume is provided by I/O, internal board-to-board, and other connector and cable connector/assembly categories.

During the 2001-2006 period, the computer Industry grew at a combined unit growth rate of 12.8%, aided by the recovery from the 2001 recession. The 2006-2011 growth rate will be about 8% considering it's starting from higher 2006 base than we did in 2001. The projected 15-year CAGR is 11%. The developing third world demand, with one-half of the world's population, will become a major growth engine.

Years 2005 and 2006 were strong for the computer industry, although demand is cooling slightly in 2007 for computer sales. Proprietary RISC servers continue under pressure from PC server architecture. Digital convergence continues to spark new developments. However, the, the market is generally healthy and continues to hold promise.



The Connector Customer Base continues to trend toward EMS/ODM outsourcing. OEM consolidation has somewhat stabilized around existing major players (Acer, Apple, Dell, HP and IBM), but there will be new players in the blade server, storage, embedded computing and I/O areas. There is also the possibility of additional consolidation (or the emergence of new major players from Asia).

Other connector trends include:

- ◆ Connector Usage in computers will be influenced by: Higher levels of integration, streamlined circuitry, industry standardization and encroachment by cable-less wireless interconnect. These encroachments are not anticipated to have a major impact.
- ◆ Market Segments for computer assembly (PDA, PC, PC Server, I/O, LAN) will be offshore, mostly China and the Asia Pacific region.
- ◆ Competitive pressures will remain, particularly as defacto-standardized interfaces become more dominant.
- ◆ PCIe will dominate most computer equipment bus applications for at least the next 5-7 years.
- ◆ Infiniband and other high performance interfaces will grow, but not as widely as once thought.
- ◆ DDR2, 3, X memory sockets will remain the standard through at least 2011.
- ◆ Multi-Core CPU pad counts will continue to rise beyond 1200 pin Socket F, with BLGA designs preferred.
- ◆ I/O Connectors will be infringed upon by wireless, but we believe there will remain a 50-75% co-existence of RJ45 and USB, including the power distribution issue.
- ◆ LCD Displays & their FEC/FPC interconnect are now dominant and will remain so, with new LCD technologies emerging (OLED, 3D).
- ◆ HDDs are shifting to SATA with drive capacities ≥ 1 TB as 3D areal density explodes. Flash Memory will compete for some HDD applications.
- ◆ Storage Systems will continue to shift toward SAN and NAS topologies, with SAS & SATA making inroads.

World Computer and Peripheral Connector Market

Connector Type	2006/2011			2006/2016	
	2006	2011	CAGR	2016	CAGR
I-O Connectors	\$1,267.5	\$1,745.8	6.6%	\$2,573.8	7.3%
Internal Board to Board Connectors	\$2,840.6	\$4,010.3	7.1%	\$6,043.9	7.8%
Other Type Connectors	\$635.3	\$922.9	7.8%	\$1,632.5	9.9%
Cable/Connectors	\$2,402.2	\$3,937.3	10.4%	\$6,666.4	10.7%
Other Interconnect *	\$942.0	\$1,017.6	1.6%	\$1,607.8	5.5%
Total Connectors	\$8,087.6	\$11,633.9	7.5%	\$18,524.1	8.6%

\$ Millions

* Value-Added, custom, equipment room/premises wiring, and other.

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