

# Connector Industry Forecast

Research Report F-2017-01  
June 2017



# Connector Industry Forecast

Report No.: F-2017-01

June 2017

Bishop & Associates has just released the **Connector Industry Forecast**. This eight-chapter report provides an in-depth, and detailed forecast of the worldwide connector Industry. In addition to the detailed forecasts for each region of the world (North America, Europe, Japan, China, Asia Pacific, ROW), an industry overview is included which provides current market trends, including connector confidence level, currency fluctuation affects, and industry sales performance, as well as an outlook narrative.



Worldwide and each regional forecast includes:

## Computers & Peripherals

- Mobile Computers
- Desktops
- Servers
- Storage Equipment
- Input/Output Equipment
- Communication LAN Devices
- Other Computer Equipment

## Business/Office Equipment

- Retail/POS Equipment
- Imaging Systems
- Other Business/Office Equipment

## Instrumentation

- Automatic Test Equipment
- Analytical/Scientific Instruments
- Other Instrumentation

## Medical Equipment

- Diagnostic & Imaging Equipment
- Therapeutic Equipment
- Other Medical Equipment

## Industrial

- Heavy Equipment
- Industrial Auto & Process Control
- Building & Civil Engineering
- Energy Markets
- Machine Tools, Machinery & Robotics
- Other Equipment

## Automotive

- Body Wiring & Power Distribution

Powertrain

- Comfort, Convenience & Entertainment
- Navigation & Instrumentation
- Safety & Security

## Transportation (non-auto)

- Commercial Vehicles
- RVs & Power Sports
- Commercial Air
- Marine
- Rail
- Construction
- Farm & Garden

## Military/Aerospace

## Telecom/Datacom

- Carrier Network
- Enterprise Network
- Wireless Infrastructure
- Subscriber Equipment
- Other Telecommunications

## Consumer

- Personal/Portable Consumer
- Home Video Equipment
- Home Audio Equipment
- Consumer White Goods
- Other Consumer

## Other Equipment

## 2017 – Connector Industry on an Upward Roll

2016 was a year of recovery and growth for the connector industry. Year-over-year, total connector sales grew +4.1% to \$54,164 million. Although not all regions saw growth, China had double-digit expansion while Europe and ROW had solid mid-single digit growth. Japan and Asia Pacific the two regions that did not grow, declined 7.8% and 3.4% respectively. North America, who saw sales decline 3.1% in 2015, saw sales grow 3.1% in 2016.

In US dollars, Japan's decline of -7.8% means connector sales have declined three of the last four years, from a high of \$6,400 million in 2012, to \$4,391 million in 2016. This represents a loss of over 31% of connector sales in only four years! Asia Pacific's decline of -3.4% is the first decline in sales they have experienced since the 2009 financial crisis. What is even more astounding is that Asia Pacific is now almost twice the size of Japan. Ten years ago, Japan was larger than Asia Pacific.

The Chinese connector market's gain of 11.9% was the largest gain in 2016, and puts them almost five billion dollars ahead of any other region. It is interesting to note that in 10 years, the Chinese market has almost doubled in size, going from \$8,262 million in 2006 to \$16,465 million in 2016. At the same time, China's market share has grown from 19.1% of the total world market to 30.4%.

Although Europe had good growth, increasing sales by 5.4%, they still have only seen one period over the last five years where they had consecutive year-over-year growth. This inconsistent growth puts them below sales levels seen as little as five years ago. The ROW region, which had the second greatest year-over-year increase in 2016, is still experiencing market share loss, with market share dropping from 5.4% in 2006 to 4.5% in 2016.

The connector industry's sales by region are noted in the following table.

### Industry Sales Performance by Region

Region	2015	2016	Percent Change
North America	\$11,233.2	\$11,576.0	3.1%
Europe	\$10,452.7	\$11,015.0	5.4%
Japan	\$4,760.1	\$4,391.0	-7.8%
China	\$14,719.1	\$16,465.4	11.9%
Asia-Pacific	\$8,592.6	\$8,296.7	-3.4%
ROW	\$2,292.1	\$2,419.5	5.6%
<b>Total World</b>	<b>\$52,049.8</b>	<b>\$54,163.7</b>	<b>4.1%</b>

\$ Millions

# Connector Industry Forecast

## 2017 Outlook

We are forecasting 2017 sales to grow X.X to \$5X,XXX.X million.

### 2017F Connector Forecast by Geographic Region With Percent Change

Region	2016	2017F	YOY Change
North America	\$11,576.0	\$XX,XXX.X	X.X%
Europe	\$11,015.0	\$XX,XXX.X	X.X%
Japan	\$4,391.0	\$X,XXX.X	X.X%
China	\$16,465.4	\$XX,XXX.X	X.X%
Asia-Pacific	\$8,296.7	\$X,XXX.X	X.X%
ROW	\$2,419.5	\$X,XXX.X	X.X%
<b>Total World</b>	<b>\$54,163.7</b>	<b>\$XX,XXX.X</b>	<b>X.X%</b>

\$ Millions

Here are some points to consider in support of the 2017 forecast:

- This projected mid-single-digit growth is in line with GDP growth projections by the IMF for the various regions of the world.
- For most of the major economies of the world, consumer confidence and business confidence are positive and generally trending upward.
- Continuation of low energy prices. Energy prices, in particular oil prices, have stabilized in 2016 at a relatively modest level. This is anticipated to continue into 2017. This will put an additional strain on countries who rely heavily on fuel exports and discourage mining and exploration equipment investments.
- Although still at historical lows, interest rates are increasing. In fact, it is estimated that there will be three interest rate hikes in 2017 in the US, and an increase in the UK to offset higher inflation. This will likely have a mixed effect on the economy, with many expressing concerns that it could derail the slow, but steady growth currently underway in western economies.
- Economic growth may be modest in 2017, but the growth of electronics (with connector content) will continue to outpace the general economies.

# Connector Industry Forecast

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Analytical & Scientific Instruments  
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# Connector Industry Forecast

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  - Powertrain
  - Comfort, Convenience & Entertainment
  - Navigation & Instrumentation
  - Safety & Security
- Transportation
  - Commercial Vehicles
  - RV's & Power Sports
  - Commercial Air
  - Marine
- Rail
  - Construction
  - Farm & Garden
- Military
- Telecom/Datacom
  - Carrier Network
  - Enterprise Network
  - Mobile & Wireless
  - Wireless Infrastructure
  - Subscriber Equipment
  - Cable-Equipment-Infrastructure
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Chapters 4 Thru 8 Provide the Same Detail Level as Chapter 3

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# Connector Industry Forecast

## To Order Connector Industry Forecast



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## What's New ?

Bishop & Associates has recently completed several new research reports about the worldwide connector industry. A table of contents for each report can be found at <http://store.bishopinc.com>.

- ❑ **Report C-303-17**      **2017 European Customer Survey of the Electronic Connector Industry (July 2017) NEW**
- ❑ **Report F-2017-01**      **Connector Industry Forecast (June 2017) NEW**
- ❑ **Report P-910-17**      **The High-Speed Data Communications and Connectivity Market – 2017 and Beyond (June 2017) NEW**
- ❑ **Report P-799-17**      **2017 World Cable Assembly Market (April 2017) NEW**
- ❑ **Report M-700-17**      **World Connector Market Handbook (March 2017) NEW**
- ❑ **Report M-617-17**      **Digital Transformation – Industrial IoT and the Connector Market – Industrial IoT as the Driver of Connectivity – Smart Factory – Smart Grid – Smart City (February 2017)**
- ❑ **Report T-800-17**      **2017 North American Cable Assembly Manufacturers (February 2017)**
- ❑ **Report M-1501-17**      **Medical Electronics Market for Connectors (January 2017)**
- ❑ **Report P-780-16**      **World RF Coax Connector Market (November 2016)**
- ❑ **Report P-620-16**      **The World Market for Terminal Blocks (October 2016)**
- ❑ **Report M-760-16**      **Impact of Disruptive Innovations on Connector Interconnects 2016 - 2021 (October 2016)**
- ❑ **Report M-510-16**      **World Telecom Connector Market 2016 - 2021 (September 2016)**
- ❑ **Report M-650-16**      **IoT's Impact on the Telecom Connector Industry (September 2016)**

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