

World Telecom Market for Connectors

Research Report M-510-14
February 2014



Bishop and Associates has just released the 2014 *World Telecom Market for Connectors* research report. This comprehensive nine-chapter, 312-page report analyzes the telecom market, providing detailed information on the telecom market by geographic region of the world, connector type consumption, and telecom market segment. Telecom market segments covered in this report include:

- Enterprise Network Equipment
- Wireless Network Equipment
- Wireless Subscriber Equipment
- Wire-line Carrier Network Equipment
- Cable/MSO Equipment
- Other Telecom Equipment

For each market segment, the strategic implications of economics, competition, industry consolidation, convergence and technology advances are examined with respect to their impact on both the evolving architectures and corresponding evolution of the equipment design.

World Telecom Market

The drivers for connector sales into the telecom market are largely based on consumer behavior – consumers of Internet connectivity, data centers and wireless applications. Today, everyone wants to be connected all the time, whether it is for work or leisure. As a consequence, this connection is becoming increasingly a wireless one.

According to a recent study by the US National Health Information Survey (NHIS) conducted by the Centers for Disease Control (CDC), more than 30-percent of all US households no longer have landlines. In addition, several studies have shown that nearly 90-percent of US adults now own cell phones. And, as generation Z (those born in the early 2000s) matures, this statistic will only increase.

In China, the fastest growing mobile market, the percentage of mobile-phone-only households is even higher – close to 50%. In fact, the number of mobile lines sold in China surpassed landlines nearly 10 years ago – in 2004. In 2012, more than 1.1-billion people in China had mobile phones and almost a quarter of them were Smartphones, according to data released by the Chinese Ministry of Industry and Information Technology. And, its mobile phone industry brought in more than \$1.3-trillion in revenue – half of which came from outside of China.

These facts not only fuel the growth in the wireless sector itself, but puts many demands on the wire-line networks and data centers that support it. For instance, when a consumer (business or leisure) wants to upload a picture taken on a trip to Facebook or LinkedIn the following steps need to take place:

1. Travels through the wireless fronthaul and backhaul networks
2. Travels through the wire-line network
3. Into the over-the-top (OTT) service provider's (Facebook or LinkedIn) network and data center
4. Gets replicated to other data centers throughout the world
5. Gets posted to the consumers account

World Telecom Market for Connectors

The ripple effect is apparent. All networks are impacted. So it's no surprise that the fastest growing equipment sectors within the telecom market are data communications equipment within the enterprise segment, mobile backhaul within the wire-line carrier equipment segment and Smartphones within the wireless subscriber equipment segment.

Data communications within and between data centers is a specific growth area. This means Ethernet. The bright spots for the Ethernet market over the next five years are with 10G and beyond products and copper giving way to fiber for longer distances, both in the data center and the local area network (LAN.) Though copper still rules for lengths shorter than about 50m, since 40G and 100G are starting to take hold, this distance will shorten to within a rack of equipment. So long-term opportunities for connector companies lie in short-reach copper and optical products going forward.

The telecom connector market rebounded in 2013 and is expected to grow with an overall five-year CAGR of 7.9%.

Telecom/Datacom Connector Sales By Equipment Sector 2013 through 2018F

Equipment Category	2013	2014	2015	2016	2017	2018	5 Year CAGR
Enterprise	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	Y.Y%
Wireless Infrastructure	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	Y.Y%
Wireless Subscriber	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	\$X,XXX.X	Y.Y%
Wireline Carrier	\$XXX.X	\$XXX.X	\$XXX.X	\$XXX.X	\$XXX.X	\$X,XXX.X	Y.Y%
Cable/MSO	\$XXX.X	\$XXX.X	\$XXX.X	\$XXX.X	\$XXX.X	\$X,XXX.X	Y.Y%
Other	\$XXX.X	\$XXX.X	\$XXX.X	\$XXX.X	\$XXX.X	\$XXX.X	Y.Y%
Total	\$X,XXX.X	\$XX,XXX.X	\$XX,XXX.X	\$XX,XXX.X	\$XX,XXX.X	\$XX,XXX.X	7.9%

\$ Millions

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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 M-510-14** **World Telecom Market for Connectors (February 2014) NEW**
- Report P-410-14** **Server Systems and Connector Forecast 2010-2020 (January 2014) NEW**
- Report R-3200-13** **World's Emerging Connector Markets (December 2013) NEW**
- Report F-2013-02** **Connector Industry Forecast (November 2013) NEW**
- Report M-3100-13** **Heavy Equipment Market for Connectors (November 2013) NEW**
- Report P-980-13** **Mobile Backhaul Network Technologies and Connectivity Market (October 2013) NEW**

- Report P-610-13** **World Market for Terminal Blocks (September 2013)**
- Report C-122-13** **2013 Connector Industry Yearbook (September 2013)**
- Report P-799-13** **2013 World Cable Assembly Market (August 2013)**
- Report M-121-13** **2013 Top 100 Connector Manufacturers (July 2013)**
- Report C-303-13** **2013 European Customer Survey of the Electronic Connector Industry (July 2013)**

- Report P-881-13** **Evolving High-Speed Backplane Connectors (June 2013)**
- Report M-1501-13** **Medical Electronics Market for Connectors (May 2013)**
- Report M-700-13** **Connector Market Handbook (April 2013)**

THE BISHOP REPORT - CONNECTOR INDUSTRY YEARBOOK

An annual subscription to [THE BISHOP REPORT](#) (12 issues) is available for \$950. As part of your Bishop Report subscription, you have admission to BishopReport.com, a website that provides quick access to prior issues of The Bishop Report, News Briefs, connector industry news, the connector industry forecast, and various industry statistics.

The [CONNECTOR INDUSTRY YEARBOOK](#) is available for \$1,250. However, Bishop & Associates offers a special combined price of \$1,450 for [THE BISHOP REPORT](#) and the [CONNECTOR INDUSTRY YEARBOOK](#) (an annual savings of \$750).

To view an expanded report description, and a complete table of contents, for all Bishop & Associates' research reports, [click here](#).



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