

World Connector Market Handbook

Research Report M-700-18

March 2018



World Connector Market Handbook

Report No: M-700-18
March 2018

WORLD CONNECTOR STATISTICS REGIONS – PRODUCTS – MARKET SECTORS 2008 – 2018 and 2023 FORECAST



Bishop and Associates has just released the 2018 edition of the World Connector Market Handbook. This comprehensive seven-chapter, 229-page report analyzes all aspects of the world electronic connector market. This report provides detailed connector statistics by equipment sector and product category for North America, Europe, Japan, China, Asia Pacific, and the ROW region. Included is a complete chapter on worldwide connector industry results by region, equipment sector, and product category. Data is provided for the years 2008 – 2017, and projections for 2018 and 2023 (including five-year CAGRs).

ANALYSIS OF THE WORLD ELECTRONIC CONNECTOR MARKET

Increasing over \$5.95 billion in US dollars, connector industry sales grew +11.0% from 2016 to 2017. Although all regions exhibited growth, some fared better than others. The Chinese region, where connector sales grew the most, increased +15.9%, increasing sales dollars by \$2.6 billion. The ROW region, where just two years ago, connector sales declined -19.9%, had the second greatest growth, increasing +12.9%. The ROW region was followed by Japan, with a year-over-year increase of +11.7% and Europe with a year-over-year increase of 11.6%. The balance of the regions, North America and Asia Pacific, each exhibited single-digit growth with year-over-year increases of 6.8% and 5.3% respectively.

World Connector Market by Region

| Region | 2016 | 2017 | Percent Change |
|---------------|-------------------|-------------------|----------------|
| North America | \$11,576.0 | \$12,366.7 | 6.8% |
| Europe | \$11,015.0 | \$12,295.9 | 11.6% |
| Japan | \$4,391.0 | \$4,904.9 | 11.7% |
| China | \$16,465.4 | \$19,082.1 | 15.9% |
| Asia-Pacific | \$8,296.7 | \$8,733.8 | 5.3% |
| ROW | \$2,419.5 | \$2,732.2 | 12.9% |
| Total | \$54,163.7 | \$60,115.8 | 11.0% |

\$ Millions

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Regional Summary

As the following tables indicate, the strong double-digit positive growth in 2017, provided a much-needed boost to the five-year, 10-year, and 20-year compound annual growth rates. The five-year CAGR, increased from X.1% to X.8%, while the 10-year and 20-year CAGR's both increased X.X%, to X.8% and X.6% respectively.

Regional Growth Rates 2016-2017

| Region | 2016 | 2017 | % Change | Past 5 Year CAGR | Past 10 Year CAGR | Past 20 Year CAGR |
|---------------|-------------------|-------------------|--------------|---------------------|----------------------|----------------------|
| North America | \$11,576.0 | \$12,366.7 | 6.8% | X.X% | Y.Y% | Z.Z% |
| Europe | \$11,015.0 | \$12,295.9 | 11.6% | X.X% | Y.Y% | Z.Z% |
| Japan | \$4,391.0 | \$4,904.9 | 11.7% | X.X% | Y.Y% | Z.Z% |
| China | \$16,465.4 | \$19,082.1 | 15.9% | X.X% | Y.Y% | ZZ.Z% |
| Asia-Pacific | \$8,296.7 | \$8,733.8 | 5.3% | X.X% | Y.Y% | Z.Z% |
| ROW | \$2,419.5 | \$2,732.2 | 12.9% | X.X% | Y.Y% | Z.Z% |
| Total | \$54,163.7 | \$60,115.8 | 11.0% | X.X% | Y.Y% | Z.Z% |

\$ Millions

Regional Growth Rates 2015-2016

| Region | 2015 | 2016 | % Change | Past 5 Year CAGR | Past 10 Year CAGR | Past 20 Year CAGR |
|---------------|-------------------|-------------------|-------------|---------------------|----------------------|----------------------|
| North America | \$11,233.2 | \$11,576.0 | 3.1% | X.X% | Y.Y% | Z.Z% |
| Europe | \$10,452.7 | \$11,015.0 | 5.4% | X.X% | Y.Y% | Z.Z% |
| Japan | \$4,760.1 | \$4,391.0 | -7.8% | X.X% | Y.Y% | Z.Z% |
| China | \$14,719.1 | \$16,465.4 | 11.9% | X.X% | Y.Y% | ZZ.Z% |
| Asia-Pacific | \$8,592.6 | \$8,296.7 | -3.4% | X.X% | Y.Y% | Z.Z% |
| ROW | \$2,292.1 | \$2,419.5 | 5.6% | X.X% | Y.Y% | Z.Z% |
| Total | \$52,049.8 | \$54,163.7 | 4.1% | X.X% | Y.Y% | Z.Z% |

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End-Use Equipment Sectors

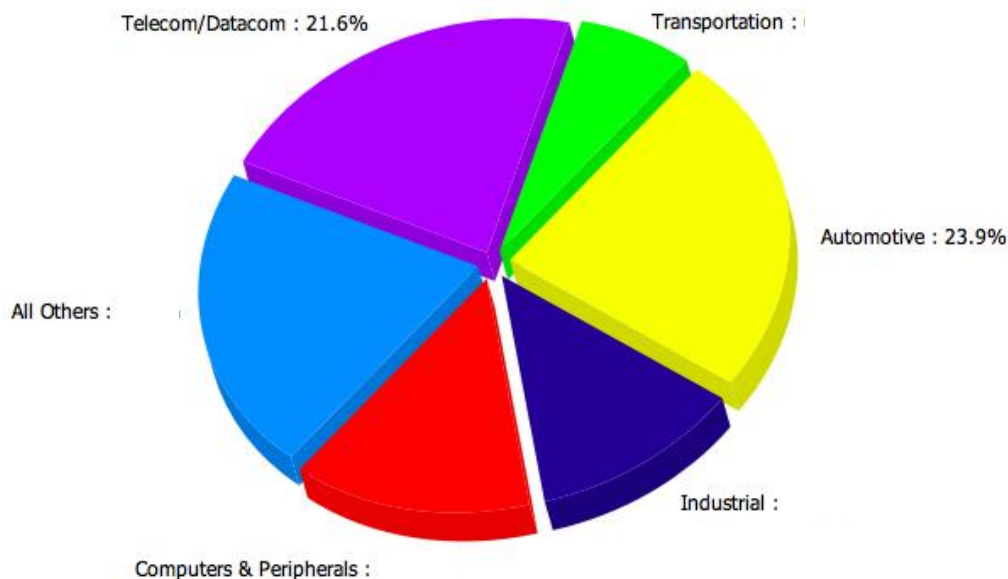
Automotive was the largest end-use equipment sector for electronic connector products, with 2017 shipments of \$14,339.7 million and is anticipated to maintain this position in 2018. Connectors utilized in the automotive sector accounted for 23.9% of all connectors manufactured in 2017. Connectors used in the telecom/datacom sector followed behind automotive, with 21.6% percent of the total market, up from 21.4% in 2016.

World Connector Market by Equipment Sector

| Sector | 2017 | 2018F | Percent Change |
|---------------------------|-------------------|-------------------|----------------|
| Computers & Peripherals | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Business/Office Equipment | \$XXX.X | \$XXX.X | Y.Y% |
| Instrumentation | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Medical Equipment | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Industrial | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Automotive | \$14,339.7 | \$XX,XXX.X | Y.Y% |
| Transportation (non-auto) | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Military/Aerospace | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Telecom/Datacom | \$X,XXX.X | \$X,XXX.X | YY.Y% |
| Consumer | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Other | \$X,XXX.X | \$X,XXX.X | Y.Y% |
| Total | \$60,115.8 | \$64,198.1 | 6.8% |

\$ Millions

World Connector Market - Top 5 Equipment Sectors – 2017



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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-700-18** **World Connector Market Handbook (March 2018) NEW**
- **Report P-420-18** **IC Socket Market - System and Connector Forecast - 2016 to 2023 (March 2018) NEW**
- **Report M-860-18** **Computer Market and Big Data Systems and Connectors 2017 to 2022 and Beyond (January 2018) NEW**
- **Report F2017-02** **Connector Industry Forecast (December 2017) NEW**
- **Report CA-785-17** **Top 100 Cable Assembly Companies (December 2017) NEW**
- **Report P-881-17** **Evolving High-Speed Backplane Connectors (November 2017)**
- **Report P-940-17** **World Market for Connectors used in Mobile Network Infrastructure Equipment – 2017 to 2022 (October 2017)**
- **Report M-121-17** **2017 Top 100 Connector Manufacturers (August 2017)**
- **Report C-122-17** **2017 Connector Industry Yearbook (July 2017)**
- **Report C-303-17** **2017 European Customer Survey of the Electronic Connector Industry (July 2017)**
- **Report P-910-17** **The High-Speed Data Communications and Connectivity Market – 2017 and Beyond (June 2017)**
- **Report P-799-17** **2017 World Cable Assembly Market (April 2017)**
- **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)**

THE BISHOP REPORT - CONNECTOR INDUSTRY YEARBOOK

An annual subscription to [**THE BISHOP REPORT**](#) (12 issues) is available for \$1,150. As part of your Bishop Report subscription, you have access, through Bishopinc.com, to prior issues of The Bishop Report, News Briefs, Financial Benchmarks, and various connector industry indices. An annual corporate subscription is available for \$2,950, which includes an unlimited number of subscribers and one PDF version of the Yearbook.

The [**CONNECTOR INDUSTRY YEARBOOK**](#) is available for \$1,500. However, Bishop & Associates offers a special combined price of \$1,750 for [**THE BISHOP REPORT**](#) and the [**CONNECTOR INDUSTRY YEARBOOK**](#) (an annual savings of \$900).

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Bishop & Associates Inc.

1209 Fox Glen Drive • St. Charles, IL 60174

Phone: 630.443.2702 • Fax: 630.443.2704 • bishop@bishopinc.com • ConnectorIndustry.com

Online Ordering: <http://store.bishopinc.com>