

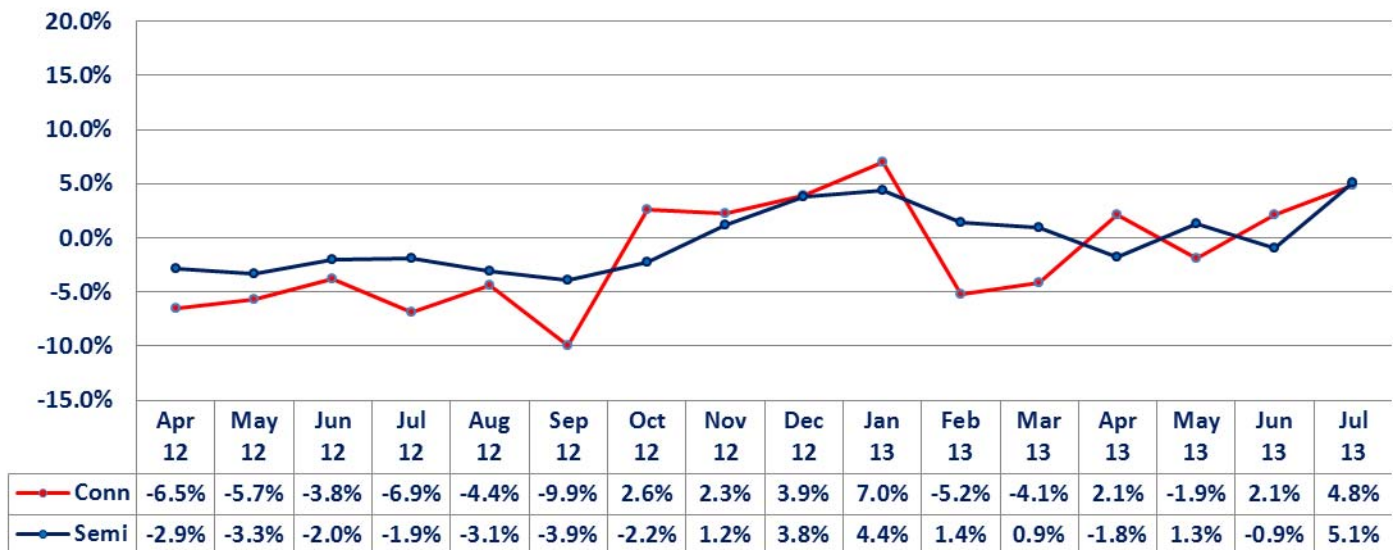
Semiconductor Sales Grow +5.1% YOY in July 2013

The Semiconductor Industry Association (SIA) reported July sales of \$25.5 billion, up +5.1% from July 2012 and up +2.6% sequentially from June. Year-to-date industry sales are up +1.9% worldwide.

As a comparison, July 2013 connector sales grew +4.8% versus July 2012. The connector industry sales are up +1.9% year-to-date over 2012.

The following graph compares semiconductor sales performance to the connector industry.

Monthly Sales Performance Year-Over-Year



- July's year-over-year growth of ~5% was the best month since January 2013 for both industries.
- Semiconductor sales have alternated between positive and negative year-over-year growth for the last five months. Few of the monthly growth figures have deviated far from zero percent. Both industries have very sluggish results reminding us that we continue to operate in a lethargic and fragile economic environment.

The following table displays year-to-date performance by geographic region for both components.

**July Sales Performance
Year-To-Date**

	Semiconductors	Connectors
North America	5.6%	4.9%
Europe	-0.3%	5.2%
Japan	-17.7%	-14.6%
China	NA	2.1%
Asia Pacific	6.2%	5.1%
World	1.9%	1.9%

- Year-to-date performance for both industries is equal at +1.9%.
- Asia Pacific, including China, has stronger semiconductor sales than the connector industry.
- Japan has nearly the same poor performance for both industries.
- Connector growth is stronger than Semiconductor growth in Europe.

Semiconductor sales are forecast to grow +4.5% in 2013 to \$304 billion. Connector industry sales are forecast to growth +2.7% in 2013 to \$49 billion.