

## Strong Start for Industry in 2021 January up 16.2%

### Regional Performance:

Worldwide year-over-year connector bookings rose for the sixth-consecutive month in January. Orders in January grew in all six regions led by Asia Pacific, up +25.5% and followed by China, up +25.1%. Worldwide sales grew +16.2% with all regions experiencing significant growth.

### 2021 Currency Impact:

The dollar starts the year significantly weaker against the euro, the yen, and the yuan in January. The industry grew at +11.1% YOY in January in local currencies versus +16.2% in USD. Connector sales are -5.1 percentage points smaller when expressed in local currencies.

### 2020 Year End Results and

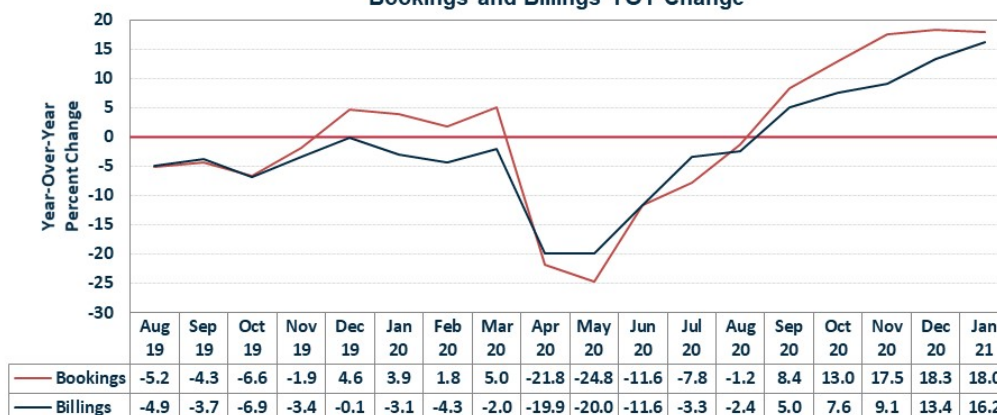
**2021 Forecast:** The industry beat expectations with a slight decline, down -2.2%. Demand for electronic connectors exceeded most outlooks as the world shifted much of its workforce from the office to the home and new electronic product purchases supported this change. Bishop forecasts +7.0% growth for full-year 2021.

### Merger and Acquisition Services Buy & Sell-Side

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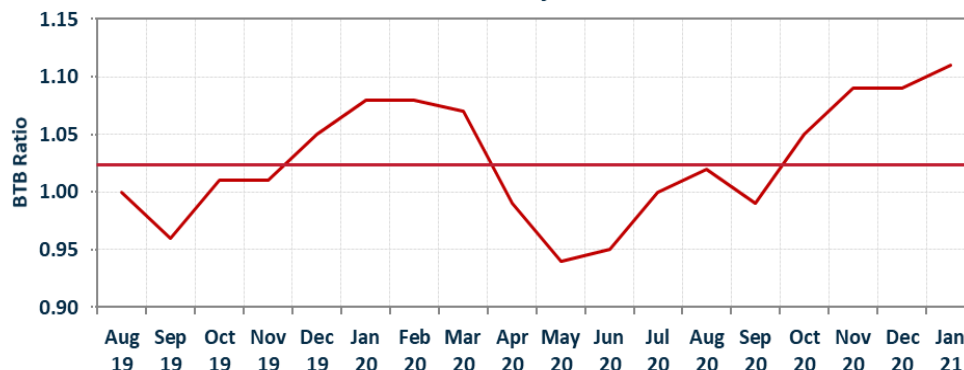
January continues to follow the stellar bookings path of December. Sales for the month were up +16.2% YOY. January bookings were up a healthy +18.0%. Year-over-year comparisons over the next several months will likely continue to produce double-digit growth.

Bookings and Billings YOY Change



The book-to-bill ratio in January rose to 1.11 as orders continued to strengthen.

Connector Industry Book-to-Bill

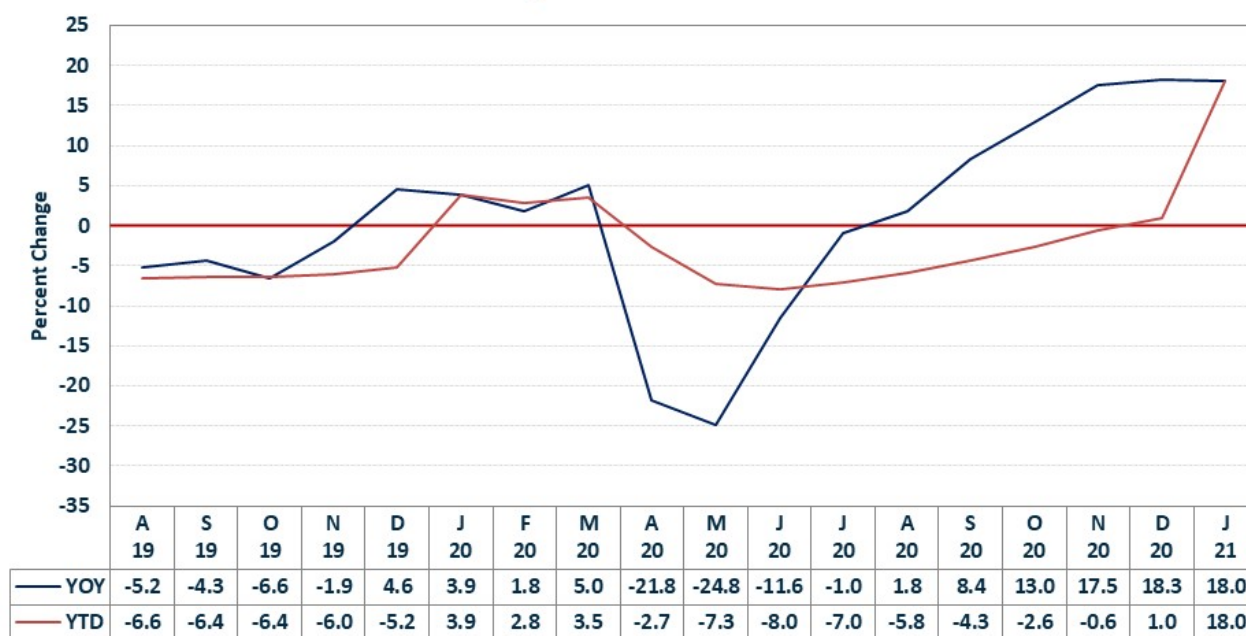


## Booking Highlights and Conclusions

### Sequential, Year-Over-Year, and Year-To-Date Bookings Percentage Change – 2019/2020/2021

Month	Sequential			Year-Over-Year			Year-To-Date		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
Jan	1.0%	0.2%	-3.1%	-3.7%	3.9%	18.0%	-3.7%	3.9%	18.0%
Feb	7.7%	5.5%		-6.2%	1.8%		-5.0%	2.8%	
Mar	-4.5%	-1.4%		-6.8%	5.0%		-5.6%	3.5%	
Apr	-2.2%	-27.2%		-8.8%	-21.8%		-6.4%	-2.7%	
May	6.9%	2.9%		-7.0%	-24.8%		-6.5%	-7.3%	
Jun	-8.9%	7.0%		-9.0%	-11.6%		-6.9%	-8.0%	
Jul	2.8%	15.2%		-8.4%	-1.0%		-6.9%	-7.0%	
Aug	7.8%	10.7%		-5.2%	1.8%		-6.6%	-5.8%	
Sep	-7.1%	-0.9%		-4.3%	8.4%		-6.4%	-4.3%	
Oct	0.6%	4.7%		-6.6%	13.0%		-6.4%	-2.6%	
Nov	10.8%	15.2%		-1.9%	17.5%		-6.0%	-0.6%	
Dec	-7.8%	-7.2%		4.6%	18.3%		-5.2%	1.0%	

Bookings - YOY and YTD



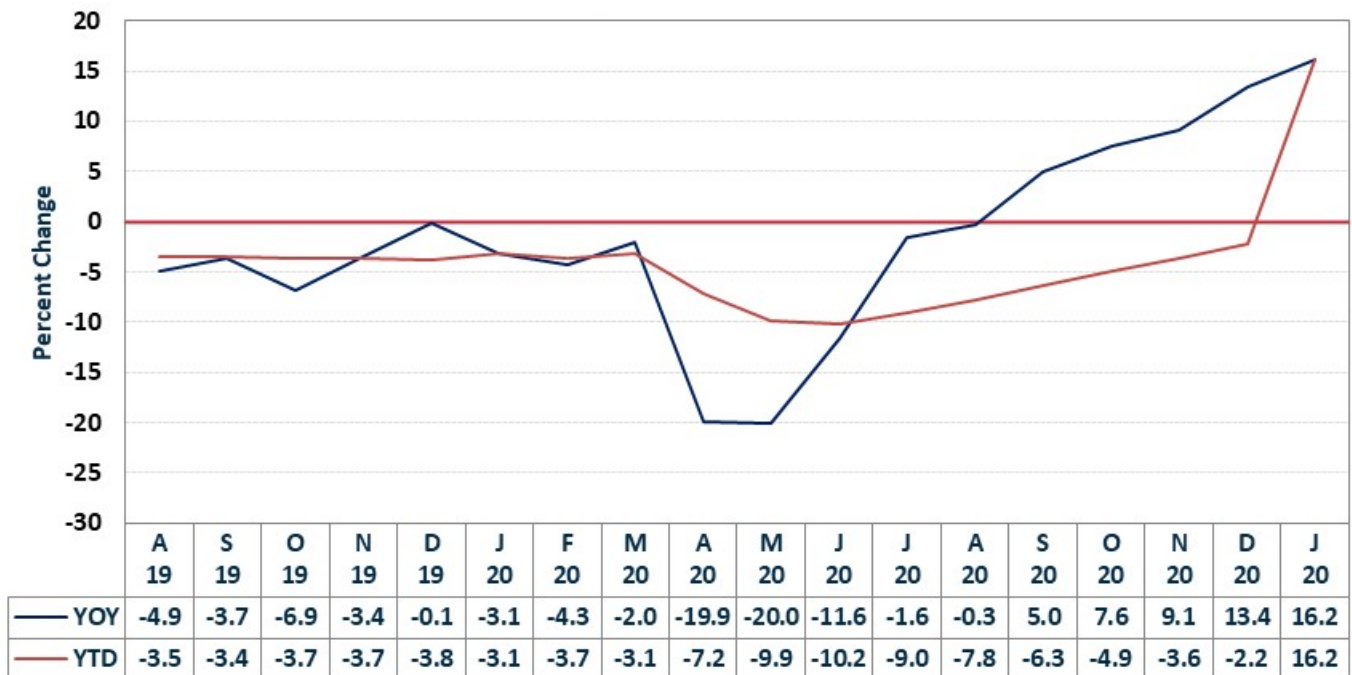
- January bookings rose +18.0% year-over-year (YOY).
- Orders declined -3.1% sequentially.
- The book-to-bill ratio for January strengthened to 1.11.

## Billing Highlights and Conclusions

### Sequential, Year-Over-Year, and Year-To-Date Billings Percentage Change – 2019/2020/2021

Month	Sequential			Year-Over-Year			Year-To-Date		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
Jan	0.3%	-2.8%	-3.6%	-1.0%	-3.1%	16.2%	-1.0%	-3.1%	16.2%
Feb	6.8%	5.5%		-2.5%	-4.3%		-1.8%	-3.7%	
Mar	-3.2%	-0.9%		-2.4%	-2.0%		-2.0%	-3.1%	
Apr	-3.7%	-21.2%		-5.4%	-19.9%		-2.8%	-7.2%	
May	9.0%	8.8%		-4.3%	-20.0%		-3.1%	-9.9%	
Jun	-4.2%	5.8%		-4.2%	-11.6%		-3.3%	-10.2%	
Jul	-2.0%	9.0%		-3.1%	-1.6%		-3.3%	-9.0%	
Aug	7.0%	9.0%		-4.9%	-0.3%		-3.5%	-7.8%	
Sep	-2.9%	1.7%		-3.7%	5.0%		-3.4%	-6.3%	
Oct	-4.1%	-1.0%		-6.9%	7.6%		-3.7%	-4.9%	
Nov	9.8%	11.4%		-3.4%	9.1%		-3.7%	-3.6%	
Dec	-11.2%	-7.7%		-0.1%	13.4%		-3.8%	-2.2%	

### Billings - YOY and YTD

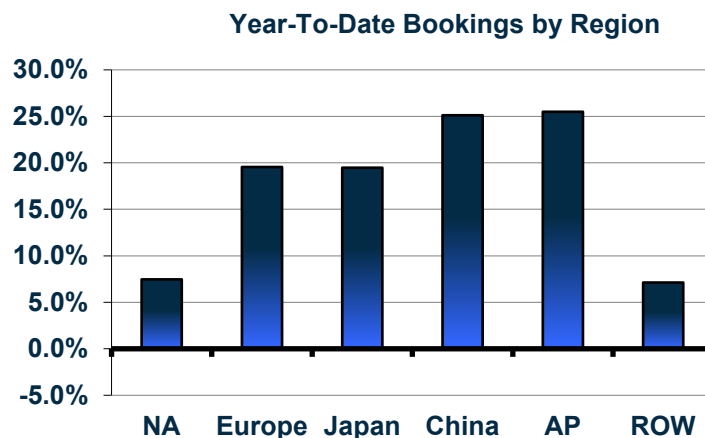


- January billings grew +16.2% YOY.
- Sequentially billings fell a modest -3.6%.

## Regional Performance

### January 2021 Bookings

Region	Sequential	YOY	YTD
NA	-5.7%	7.5%	7.5%
Europe	1.5%	19.6%	19.6%
Japan	-20.3%	19.5%	19.5%
China	-0.8%	25.1%	25.1%
AP	-1.8%	25.5%	25.5%
ROW	-16.0%	7.1%	7.1%
Total	-3.1%	18.0%	18.0%

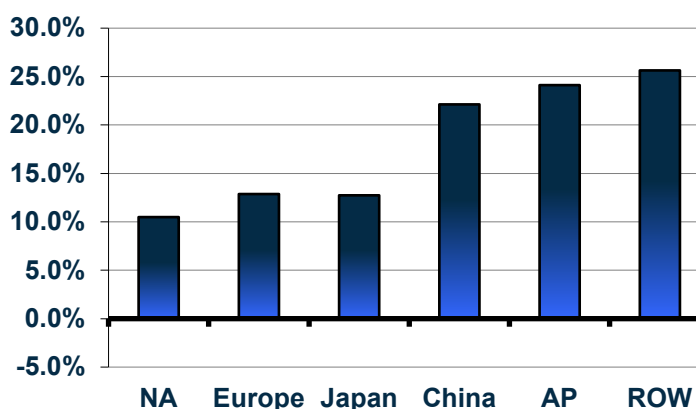


- January bookings increased +18.0% YOY. The strong bookings performance in January points to a healthy 1Q21.
- Year-over-year orders increased in all regions with double-digit growth in four regions for the second consecutive month. Asia Pacific and China witnessed bookings growth over +25%. Orders in Europe and Japan climbed double-digits, up +19.6% and +19.5% respectively.
- Year-over-year comparisons will be relatively easy, and many of these regions will see double-digit YOY growth for the next several months.

## January 2021 Billings

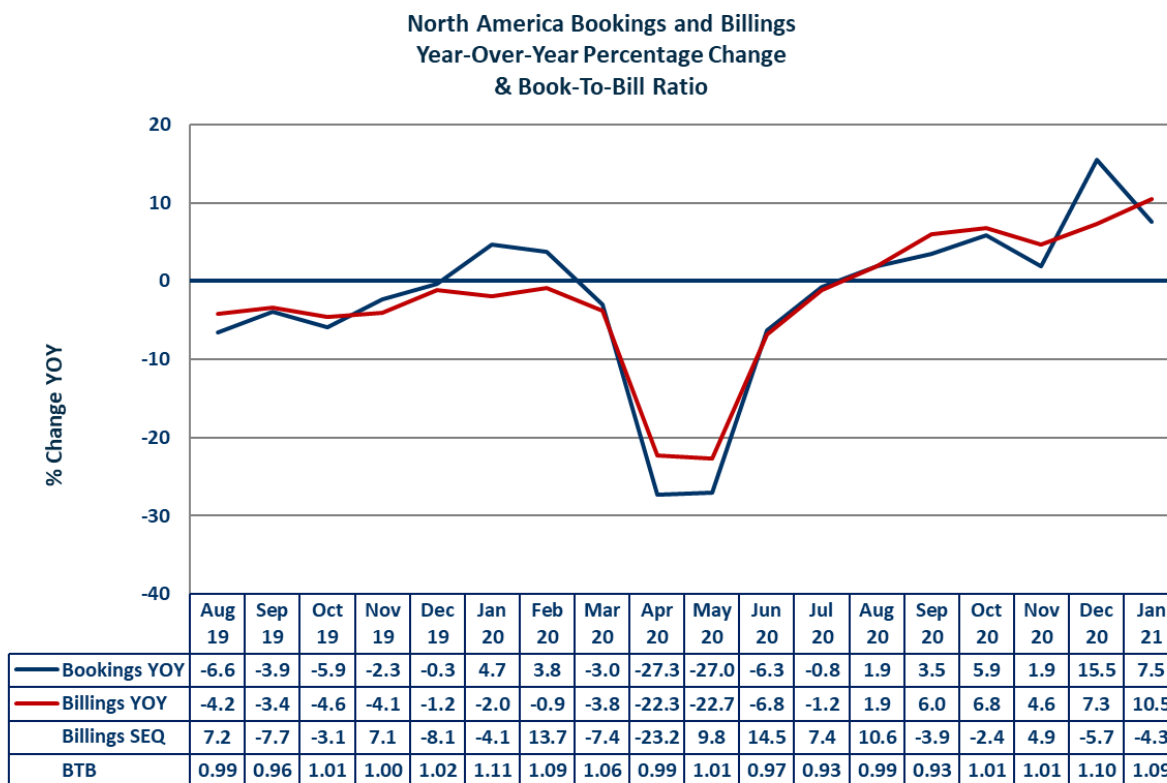
Region	Sequential	YOY	YTD
NA	-4.3%	10.5%	10.5%
Europe	0.2%	12.9%	12.9%
Japan	-11.5%	12.7%	12.7%
China	-5.4%	22.1%	22.1%
AP	-2.7%	24.1%	24.1%
ROW	-2.8%	25.6%	25.6%
Total	-3.6%	16.2%	16.2%

Year-To-Date Billings by Region



- January connector sales growth jumped +16.2% YOY as demand for electronic products accelerated.
- Year-over-year, all regions experienced double-digit growth, with over 20% gains in ROW, Asia Pacific, and China.
- Sequentially, sales declined in all regions with exception of Europe, which saw a +0.2% increase.
- While 2021 should see strong sales growth and may surpass 2018 as the all-time high for the industry, head-winds prevail, especially in the automotive and telecom markets where semiconductor shortages will put downward pressure on connector sales growth.

**North America:** The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill (BTB) ratio is also displayed.



## North America Performance

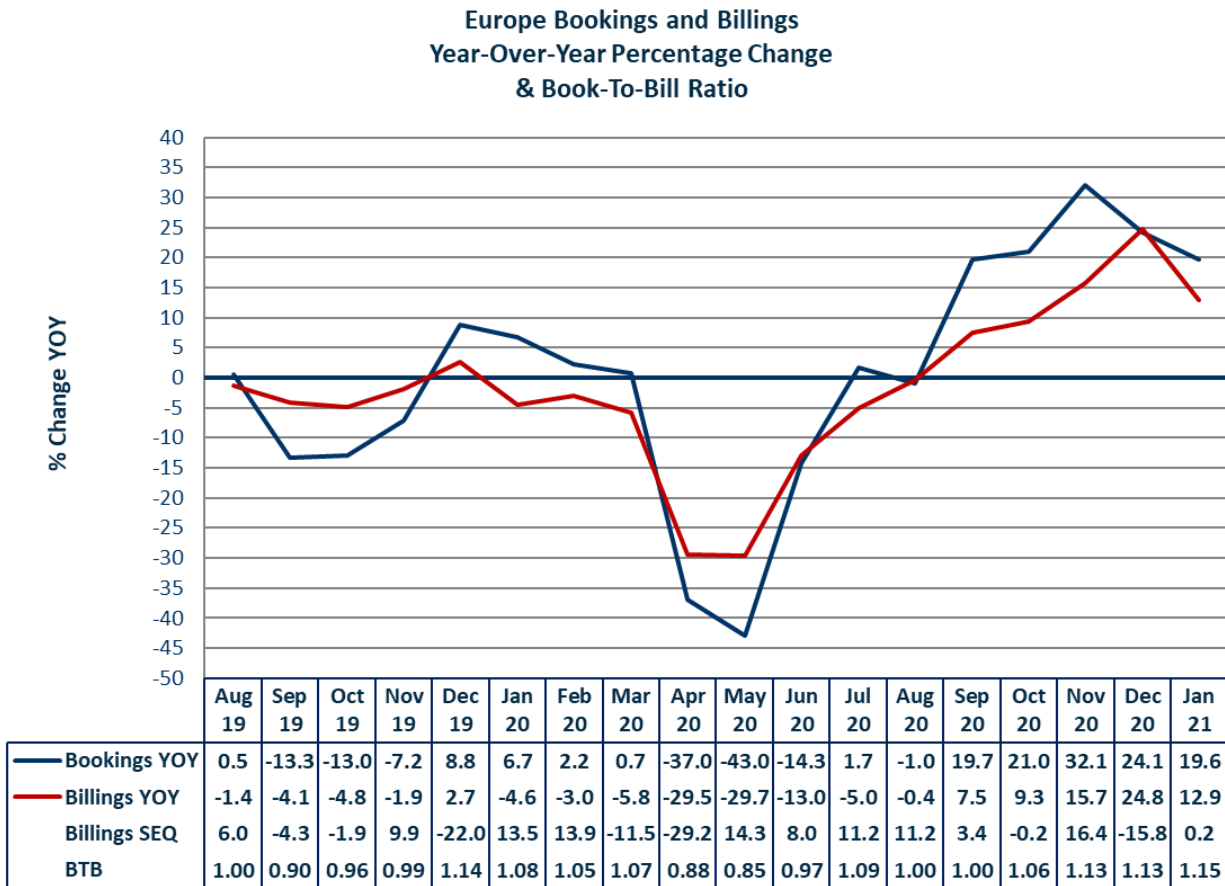
- Sales grew +10.5% and orders were up +7.5% YOY in January. North American billings continued to deteriorate sequentially, down -4.3%. Book-to-bill remained strong at 1.09.
- Industrial production fell 1.8% YOY and increased 0.9% sequentially in January.
- January Manufacturing PMI recorded its highest reading on record, posting 59.20.
- US unemployment improved to 6.3% in January from 6.7% over the prior month.
- Retail sales in the US increased 7.4% in January YOY. It was the largest increase since September 2011. Sequentially, retail sales were up 5.3%. This was the third largest increase on record.
- The annual inflation rate in the US in January remained steady at 1.4%.
- January US automotive sales were up 4.6% versus a year ago. Mexico's annual car sales declined 22.5% in January 2021 YOY.

## Conclusions

The Congressional Budget Office has projected that the United States will grow at an anemic rate of less than 2% over the next decade. Federal debt in the United States exceeded the size of the economy. The last time this happened was at the conclusion of World War II. This is before congress potentially considers another 1.9 trillion in stimulus spending. Americans are spending more of their stimulus on goods, as was captured in January's boost in retail spending growth. Our forecast for North America calls for modest growth in 2021 at around +6.2%.



**Europe:** The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.



## Europe Performance

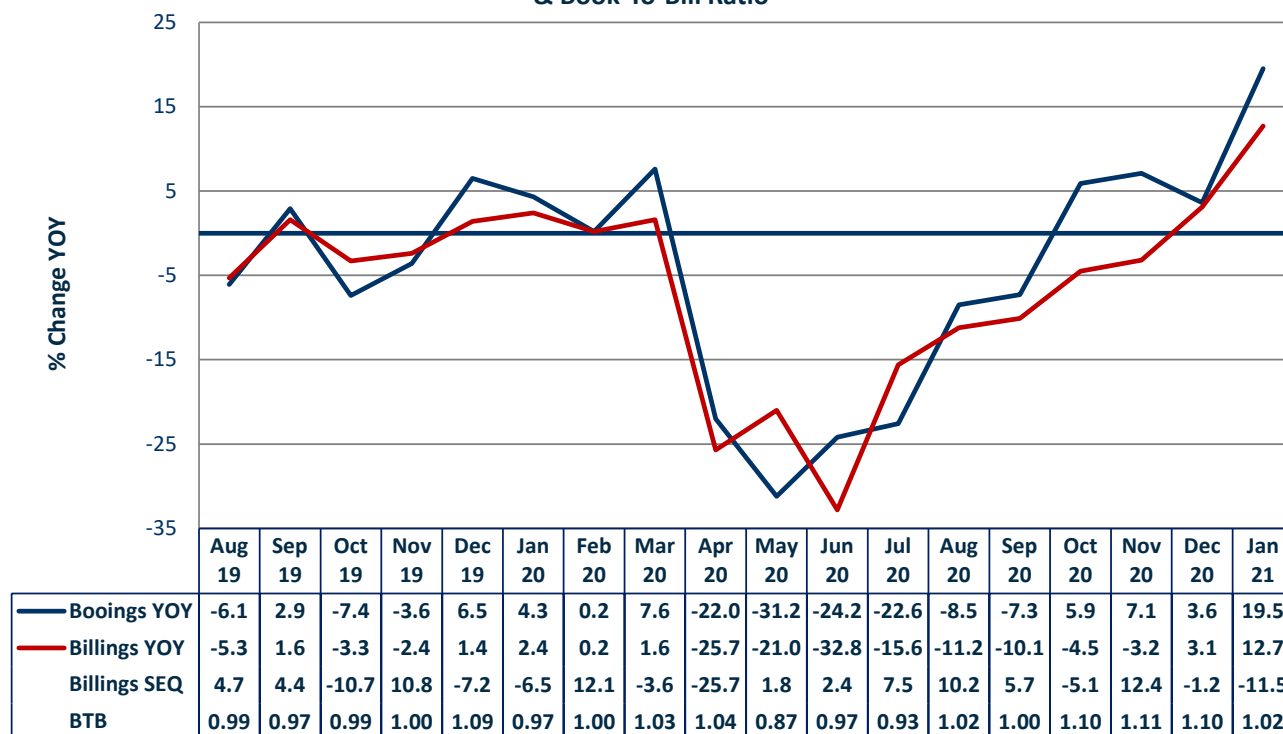
- YOY billings grew +12.9%, the fifth consecutive positive reading. Orders were up a stunning +19.6%, and the book-to-bill ratio strengthened to 1.15. Sequentially, sales were up +0.2%.
- Euro area industrial production decreased 0.8% in December YOY and was down 1.6% sequentially.
- IHS Markit Euro Area Manufacturing PMI registered its seventh consecutive month of growth with a 54.8 reading in January. Germany and the Netherlands contributed the most to Europe's manufacturing growth.
- December retail sales rose 0.6% YOY and 2.0% month-over-month.
- Euro area new car registrations collapsed 24% in January, as auto manufacturers were shutout of semiconductor supplies.
- Business confidence rose to -0.27 in January, better than the -0.41 recorded the prior month.

## Conclusions

January 2021 started the year strong for Europe. It was the only region to witness sequential connector sales growth in both bookings and billings. The automotive industry, Europe's largest connector market, will suffer significantly in 1Q21 from the semiconductor supply shortages. Bishop forecasts the 2021 European connector market to grow 5.3% year-over-year.

**Japan:** The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

**Japan Bookings and Billings  
Year-Over-Year Percentage Change  
& Book-To-Bill Ratio**



## Japan Performance

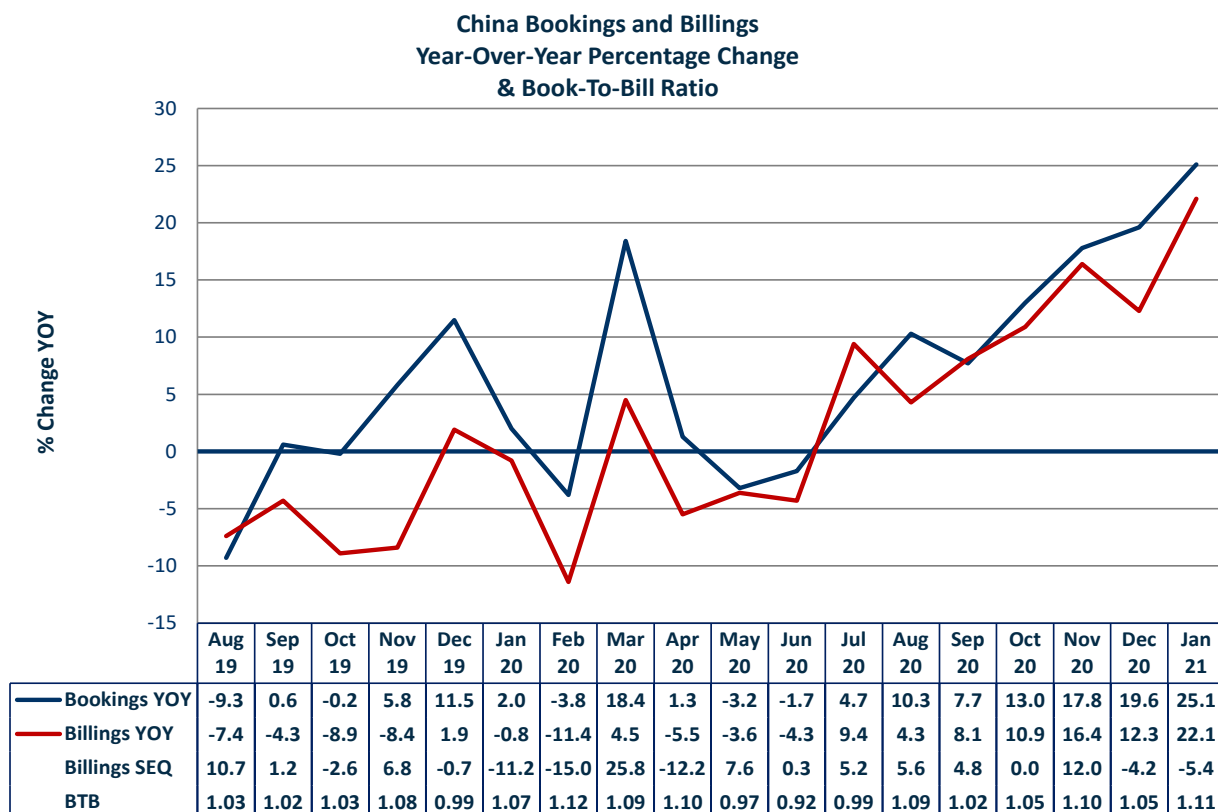
- Bookings proved especially strong in January, up +19.5. Sales increased +12.7%. Sequentially, Japan's sales dropped -11.5%. Japan's book-to-bill ratio declined to 1.02 in January.
- Industrial production decreased 1.0% from last month and declined 2.6% year-over-year in December.
- December retail sales fell 0.3% YOY and 0.8% sequentially.
- The unemployment rate remained at 2.9% in December.
- Exports rose 6.4% YOY in January. Exports to China jumped 37.5%. Sales of electrical machinery and industrial machinery to Japan's trading partners advanced 13.2% and 18.7%, respectively. Sales of transportation equipment declined 8.7%.
- Japan's February manufacturing PM registered a 50.6, the first month of factory expansion since April 2019.

## Conclusions

Japan appears to be climbing out of its economic malaise with the connector industry, posting two consecutive months of positive year-over-year growth. January's strong bookings signify growth in the months ahead. The Japanese consumer is sitting on \$300 billion USD (5.9% of GDP) recorded in the fourth quarter, which is up from \$7.6 billion (0.2% of GDP) from the prior year. The increased savings come from government emergency handouts and will probably find its way into the economy after the COVID crisis passes.



**China:** The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.



## China Performance

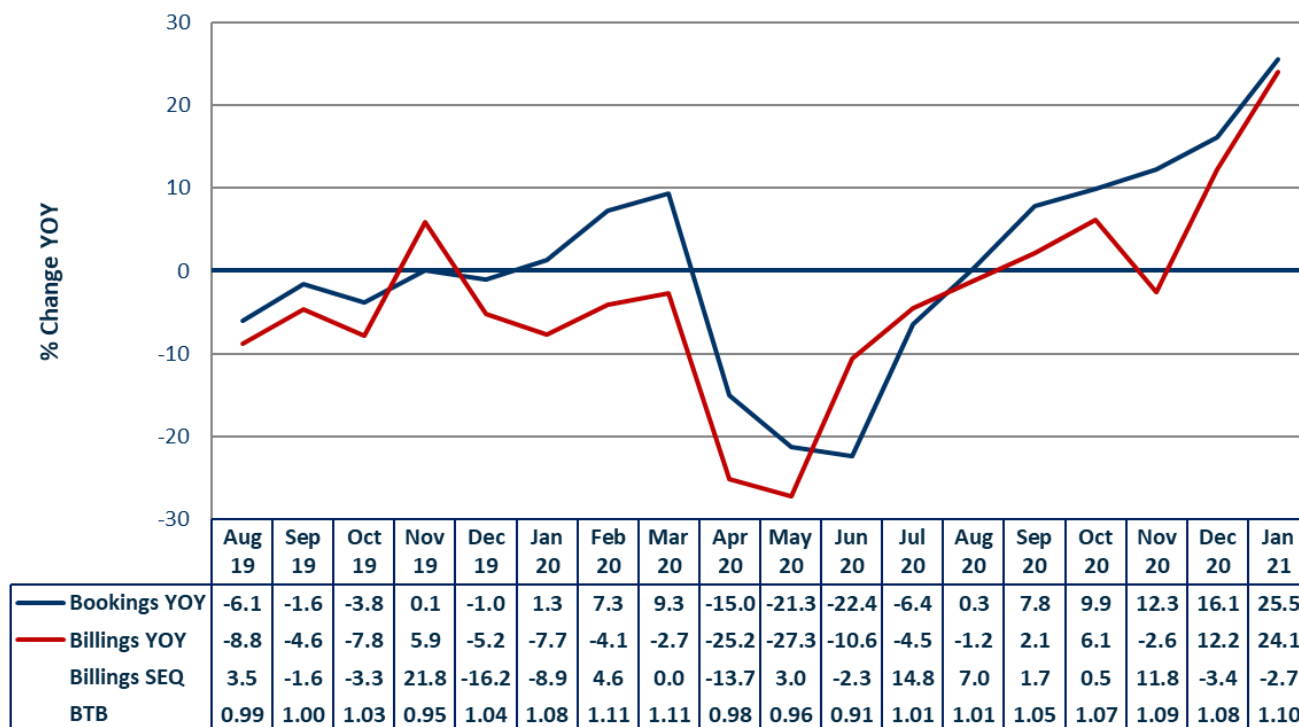
- Sales and orders, year-over-year, increased +22.1% and +25.1% respectively. The BTB was 1.11. Sequentially, sales dropped -5.4%.
- Industrial production increased 7.3% YOY in December, the highest increase since March 2019. Sales in computer and communications electronic equipment rose 11.4% YOY.
- China's manufacturing PMI, a seven-month low in January, dipped to 51.5 from in December 52.1.
- Retail sales grew 4.6% YOY in December and were up 1.24% over November. China's auto sales shrunk to a six-year low, having fallen 6.8% in 2020. Analysts have estimated that global automotive sales fell 15% last year.
- Exports from China surged 18.1% YOY in December. November imports increased by 6.5% YOY to an all-time high of USD \$203.7 billion.

## Conclusions

China joined the World Trade Organization in 2001. In 2008, China's aggressive monetary and fiscal response to the global financial crisis enabled it to surpass Japan as the second largest economy in the world. In 2020, China's response to the COVID-19 crisis resulted in a positive GDP growth rate, the only advanced economy to see growth for the year. Since October, China has posted double-digit year-over-year growth in both connectors sales and orders. China has continued to take connector market share from the other regions of the world.

**Asia Pacific:** The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

**Asia Pacific Bookings and Billings  
Year-Over-Year Percentage Change  
& Book-To-Bill Ratio**



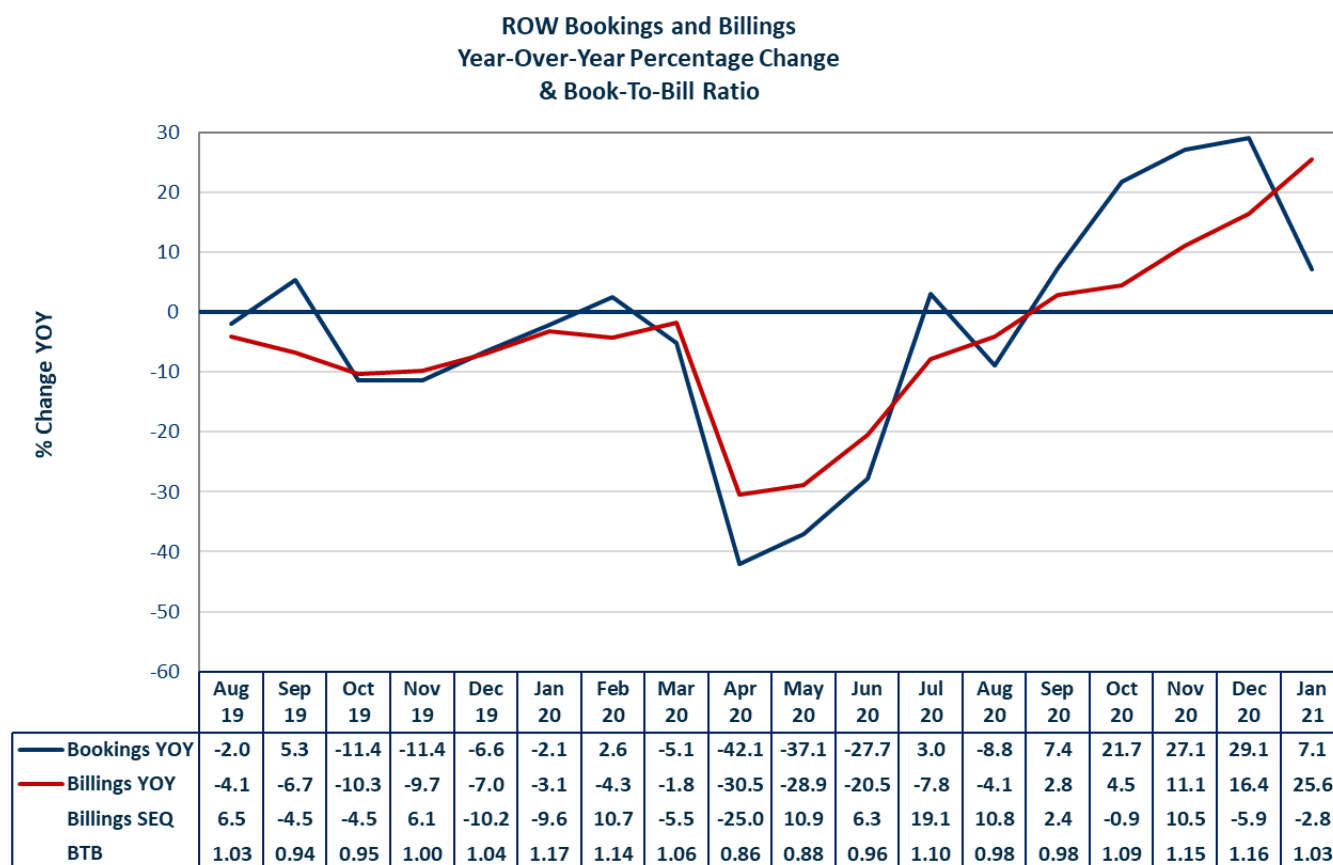
## Asia Pacific Performance

- Orders climbed +25.5% in January and sales expanded +24.1% YOY. The book-to-bill ratio rose to 1.10. January sequential sales declined -2.7%.
- India's GDP is estimated to have declined 7.7% in 2020.
- South Korea's GDP contracted 1.4% annually in the fourth quarter.
- India's industrial production rose 1.0% YOY in December, and on a month-on-month basis, it increased 7.8%. November's manufacturing production increased 1.6% YOY. Exports rose 6.16% YOY in January.
- South Korea's industrial production grew 3.4% YOY and rose 3.7% over the previous month in December. Exports in South Korea increased 11.4% in January 2021 from a year earlier. Exports to the US surged 46.1%. Export of chips grew 21.7%, automobiles jumped 40.2%, and displays and mobile devices were up 32.3% and 58%, respectively. The manufacturing production increased 3.4% YOY in December.

## Conclusions

Asia Pacific has seen a growth in bookings since August 2020. India's growing confrontation with China along the Himalayan border has prompted the country into a large-scale investment into its military worth \$130 billion. The country's 2021 military expenditure will be its largest in 15 years. India is projected to expand by 10% according to the Asia Development Bank. Much of the region will benefit from the diversification of supply chains out of China.

**Rest of World:** The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.



## Rest of World Performance

- Orders and sales increased +7.1% and +25.6% YOY in January, respectively. Sequentially, sales in the region declined -2.8%. The book-to-bill ratio rose to 1.03.
- Brazil's GDP is estimated to have declined 9.1% in 2020.
- Russia's GDP declined 3.5% (January-November).
- Brazil's industrial production increased 8.2% YOY in December, while it increased slightly over the prior month, up 0.9%. The inflation rate rose to 4.56% in January. The manufacturing PMI recorded a 56.5 reading in January 2021 indicating slowing expansion over the prior month's 61.5 reading.
- Russia's industrial production declined 2.5% YOY in January. Sequentially, exports increased 5.8% in December. The inflation rate increased to 5.2% YOY in January which is over the central bank's targeted rate of 4.0%. The unemployment rate declined to 5.8% in January from 5.9% the previous month.

## Conclusions

Both Brazil and Russia along with many of the region's other countries continue to witness economic expansion as commodity prices (copper at an eight-year high) continue to rise, providing much needed revenue.

## **2021 YTD Currency Impact on Regional Industry Growth**

The dollar began the year weaker against the euro, the yen, and the yuan in January 2021. The following table measures the impact for January 2020 versus January 2021 and shows results for these three currencies.

### **Local Currency to One USD January 2020 versus January 2021**

<b>Currency</b>	<b>2020</b>	<b>2021</b>	<b>% Change</b>
Euro	0.9003	0.8217	9.6%
Yuan	6.9242	6.4779	6.9%
Yen	109.2634	103.7430	5.3%

Europe, China, and Japan account for approximately 60% of world connector sales. Currency fluctuation to the US dollar can have a significant impact on our reporting of sales performance in US dollars.

The following table shows January year-over-year sales performance by region in US dollars and local currencies.

### **Industry Sales Performance January 2021 USD-vs-Local Currencies**

<b>Region</b>	<b>U.S.\$</b>	<b>Local Currency</b>
North America	10.5%	10.5%
Europe	12.9%	3.0%
Japan	12.7%	7.0%
China	22.1%	14.3%
Asia Pacific	24.1%	24.1%
ROW	25.6%	25.6%
<b>World</b>	<b>16.2%</b>	<b>11.1%</b>

Connector sales are 5.1 percentage points lower when stated in local currencies rather than in US dollars, putting industry performance at +11.1% in January. (versus +16.2% in US dollars).

## **2020 Year End Results and 2021 Forecast**

The COVID-19 pandemic became a reality in March of 2020 when the U.S. and many other countries closed for business. Air travel between countries stopped and everyone was sent home to “stop the spread.”

Historically the worst year in the connector industry was 2009, with sales down -21.8% (housing crisis and financial meltdown). Forecasting the full year 2020, logic would dictate that 2020 would likely result in a new record decline in connector demand. At that point in time, a sales decline of -25%, or more, seemed a reasonable assumption.

That did not happen! The first quarter was down -3.1% and the second quarter declined -17.2%. The third quarter saw stabilized demand, up +1.3% and the fourth grew a healthy +10.2%.

### **2020 Quarterly Sales Results**

Quarter	2019	2020	Percent Change
1Q	\$15,890	\$15,397	-3.1%
2Q	\$16,097	\$13,333	-17.2%
3Q	\$16,475	\$16,689	1.3%
4Q	\$15,707	\$17,308	10.2%
Total	\$64,169	\$62,727	-2.2%

\$ Millions

World connector demand declined a paltry -2.2%. If it wasn't for the turmoil caused by the pandemic, the small decline in demand would be classified as just a normal business cycle adjustment.

### **2020 Results by Region**

The two largest geographic regions, China and the U.S., achieved better results than the rest of the world. China was first in and first out of COVID-19 and achieved connector sales of +3.6%. The U.S. performed reasonably well, declining only -2.8% in connector sales, driven strongly by a decrease in the automotive and transportation sectors.

## **2020 Sales by Region**

<b>Region</b>	<b>2019</b>	<b>2020</b>	<b>Percent Change</b>
North America	\$13,887.0	\$13,491.5	-2.8%
Europe	\$13,544.2	\$12,837.5	-5.2%
Japan	\$4,891.4	\$4,430.9	-9.4%
China	\$19,477.4	\$20,184.3	3.6%
Asia Pacific	\$9,435.4	\$9,045.0	-4.1%
ROW	\$2,933.7	\$2,737.5	-6.7%
<b>Total World</b>	<b>\$64,169.1</b>	<b>\$62,726.7</b>	<b>-2.2%</b>

**\$ Millions**

## **2020 Results by Market Sector**

The world economy in 2020 was devastating to the service industry which fortunately had minimal impact on the electronics industries. This included restaurants, beauty salons, barber shops, bowling alleys, movie theaters, airlines, hotels, vacation rentals, and vacation destinations, which all saw sales plummet.

Conversely businesses tied to electronics, such as computer/computer peripherals and telecom/datacom performed much better as the world's workforce shifted to remote offices.

## **2020 Connector Sales by Market Sector**

<b>Sector</b>	<b>2019</b>	<b>2020</b>	<b>Percent Change</b>
Computer/Computer Peripherals	\$8,380.2	\$8,355.0	-0.3%
Business/Office Equipment	\$754.0	\$724.2	-4.0%
Instrumentation	\$1,836.1	\$1,811.7	-1.3%
Medical	\$1,985.8	\$1,966.6	-1.0%
Industrial	\$7,901.6	\$7,721.8	-2.3%
Automotive	\$15,209.7	\$14,145.8	-7.0%
Transportation	\$4,479.2	\$4,344.6	-3.0%
Military	\$3,796.6	\$3,770.6	-0.7%
Telecom/Datacom	\$14,269.2	\$14,479.4	1.5%
Consumer	\$3,108.8	\$3,038.4	-2.3%
Other Equipment	\$2,447.8	\$2,368.6	-3.2%
<b>Total World</b>	<b>\$64,169.1</b>	<b>\$62,726.7</b>	<b>-2.2%</b>

**\$ Millions**

The automotive industry was down -7.0%, which is the largest downturn in at least a decade for this sector. Transportation was down -3.0% with much of this decline attributed to commercial aviation.



## **How's Business Now**

Business is good. January 2021 bookings were up a staggering +18.0% over last January. Billings increased +16.2%. Sales have increased in the past five consecutive months. The book-to-bill ratio was 1.11 which signals a strong first quarter for 2021.

TE and Amphenol both projected double-digit growth in 1Q21.(TE +10.5% and Amphenol +15.5%).

The World Bank forecasts world 2021 GDP growth of 4.0%. The IMF predicts world GDP growth of 5.5%.

## **Connector Industry Forecast**

There are positive signs that 2021 will be a growth year for the connector industry.

- Interest rates are low and the Federal Reserve signaled that there will be no rate increase in 2021.
- Inflation is low, but there are signs of increasing material prices (i.e., oil, gold, platinum, steel, etc.).
- January connector sales were up +16.2% coupled with a very high book-to-bill ratio of 1.11.
- The two largest connector companies forecast double-digit sales growth in one Q 21.
- World GDP growth predicted to be in the four to five percent range. Remember much of this growth will come from a rebound in the now devastated service industry. GDP growth in electronics will be lower.

We believe the first half of 2021 will be very strong, near double digits. This is mainly because of easy comparisons to the first half of 2020, which was greatly impacted by the pandemic. The second half of 2021 may result in small declines in demand.

## **2021 Forecast by Quarter**

Quarter	2019 Actual	2020 Actual	YOY Change	2021 Forecast	YOY Change
1Q	\$15,890	\$15,397	-3.1%	\$17,037	10.7%
2Q	\$16,097	\$13,333	-17.2%	\$16,492	23.7%
3Q	\$16,475	\$16,689	1.3%	\$16,952	1.6%
4Q	\$15,707	\$17,308	10.2%	\$16,640	-3.9%
Total	\$64,169	\$62,727	-2.2%	\$67,122.2	7.0%

\$ Million, Bishop ©2021 Red=Forecast

**2021 Forecast by Region**

Region	2020	2021F	Percent Change
North America	\$13,491.5	\$14,330.4	6.2%
Europe	\$12,837.5	\$13,520.8	5.3%
Japan	\$4,430.9	\$4,654.7	5.1%
China	\$20,184.3	\$22,213.9	10.1%
Asia Pacific	\$9,045.0	\$9,535.4	5.4%
ROW	\$2,737.5	\$2,867.0	4.7%
<b>Total World</b>	<b>\$62,726.7</b>	<b>\$67,122.2</b>	<b>7.0%</b>

\$ Millions

For now we would classify our forecast as conservative and believe there is good potential for growth above +7.0%. We monitor the industry performance carefully and will change our outlook as circumstances dictate.

## Significant Events



### **Hermetic Solutions Group Acquires Cristek Interconnects, Inc.**

Hermetic Solutions Group, a global provider of highly engineered performance and protection solutions for mission-critical microelectronics, has acquired Cristek Interconnects, Inc., a leading manufacturer of specialty interconnect products and assemblies. The terms of the deal were not disclosed.

Founded in 1985, Cristek has earned the trust of its customers by combining solid interconnect design, manufacturing expertise and superior customer service. Delivering QPL and custom, mission-critical solutions to the defense/aerospace industry for over 35 years, Cristek is an award-winning organization, positioned as a strategic supplier to defense/aerospace prime contractors. Cristek's core connector technologies include Micro & Nano Miniature, D-Subminiature, RF/Microwave, and Filtered connectors.

### **Amphenol Corporation Enters into Agreement to Acquire MTS Systems Corporation**

Amphenol Corporation and MTS Systems Corporation have entered into a definitive agreement under which Amphenol will acquire MTS for \$58.50 per share in cash, or approximately \$1.7 billion, including the assumption of outstanding debt and liabilities, net of cash.

MTS is organized into two business segments: Sensors and Test & Simulation. The Sensors segment represents a highly complementary offering of high-technology, harsh environment sensors sold into diverse end markets and applications, and positions Amphenol to have one of the industry's broadest ranges of sensors and sensor-based products. The Test & Simulation segment is an industry leader and Amphenol believes it represents an attractive business with excellent near and long-term potential. Accordingly, Amphenol plans to undertake a strategic review of the business to best position it for future success.

### **Amphenol Corporation Acquires Positronic**

Amphenol Corp. has acquired Positronic, a Springfield, Mo.-based manufacturer of electronic connector products. Positronic, founded in 1966, has locations in the United States, France, Singapore, Indonesia, India, and China. Adam Norwitt, Amphenol President and CEO reported that Positronic has annual sales of approximately \$80 million. Positronic's products will complement Amphenol's, and the acquisition will allow its customers to take advantage of a broad military and aerospace connector portfolio. Terms of the deal were not disclosed.

In addition to Positronic, Amphenol recently announced its plans to acquire sensor technology company MTS Test Systems, and the acquisition of Poland-based El-Cab.

"All of the acquisitions we have completed or signed in the last year strengthen the company's global capabilities and enhance our product offerings, while adding talented management teams to the Amphenol family," Norwitt said.

## **Molex Acquires Fiberguide Industries to Extend Optical Fiber Industry Leadership and Drive Delivery of Customized, Integrated Solutions**

Molex announced the acquisition of Fiberguide Industries, a manufacturer of customized optical fiber solutions based in Caldwell, Idaho. Fiberguide will join Molex's Polymicro business, a Phoenix-based provider of specialty optical fiber and fluidic-based products tailored for medical, industrial and datacom applications. As a world leader in optical fiber arrays and cable assemblies, Fiberguide is uniquely positioned to help Molex address the stringent needs of medical applications, including high-power laser surgery, DNA sequencing and flow cytometry. Both Molex and Fiberguide bring extensive expertise in optical fibers, analytical probes, and fully packaged assemblies to support increasing demands for minimally invasive medical procedures. Additionally, a complementary portfolio of design capabilities provides customer-centric solutions for industrial monitoring and sensing as well as datacom applications.

## **Hon Hai Q4 Sales Top NT\$2 Trillion on iPhone 12 Launch**

iPhone assembler Hon Hai Precision Industry Co. reported revenue for the fourth quarter of last year passed NT\$2 trillion (US\$70.42 billion) after the iPhone 12 models went on global sale in late October. Hon Hai, also known as Foxconn on the global market, said it posted about NT\$2.008 trillion in consolidated sales, a quarterly high and up 55.45% from NT\$1.29 trillion in the third quarter. It was also the first time the world's largest contract electronics maker reported quarterly sales of more than NT\$2 trillion. As one of the most important suppliers to Apple Inc., market analysts said, Hon Hai received a boost from the launch of the newest iPhone models, all of which support 5G communications, in the October-December period. Hon Hai is the sole assembler of the larger iPhone 12 Pro and iPhone 12 Pro Max, which have been well received by the market.

In December, Hon Hai's consolidated sales stood at NT\$713.78 billion, a new monthly high and the first time it recorded revenue of more than NT\$700 billion, company data showed. December sales also rose 4.76 percent from a month earlier and soared 32.3 percent from a year earlier, the data indicated. On a year-on-year basis, Hon Hai said, its consumer electronics division achieved the highest sales growth in December, ahead of the computer division, the electronic components division and the cloud-based network devices. In 2020, Hon Hai generated NT\$5.36 trillion in consolidated sales, up 0.31 percent from a year earlier. Analysts said the small increase reflected the impact of the COVID-19 pandemic in the first half of the year, but the company's momentum started to accelerate in the second half, particularly in November and December. In 2021, analysts expect Hon Hai's consolidated sales to hit a new high of NT\$5.6 trillion, while the company's net profit is expected to rise more than 18 percent to almost NT\$125 billion with earnings per share of NT\$9.

## **Stewart Connector Announces Custom Fiber Flex Assembly Design and Manufacturing**

Stewart Connector now has Fiber Flex assembly capabilities in their Glen Rock, PA facility. This capability supports the company's growth in commercial applications where complex routing, minimal space, critical airflow is required. Fiber Flex assemblies provide a superior solution compared to individual cabling for fiber routing and management of PCB card level and back-plane applications.

## **Molex Releases Results of Global Automotive Survey on the 'Car of the Future'**

Molex unveiled results of a global survey of automotive decision makers depicting top trends and technologies impacting "car of the future" strategies and business decisions. Survey findings validate the critical role of data, software and networking in enabling electrification and connectivity—identified as the two most important areas of innovation.

Molex commissioned Dimensional Research to conduct The Future of Automotive survey polling 230

qualified participants in engineering, product, procurement, R&D, supply chain, innovation or strategy roles at automotive companies with at least 1,000 employees. Survey respondents were asked questions designed to help them visualize what an average new car purchased in 2030 might be like, including top features, initiatives, and innovations.

Key findings include:

- 91% of respondents say cars will be either fully electric (64%) or hybrid (27%).
- 97% expect "range anxiety" to be solved by 2030.
- 94% expect cars to include autonomous driving; only 28% envision fully self-driving cars.
- 56% believe 2030 cars will be at least 50% more expensive than today's cars.

## **Foxconn to Make Electric SUVs with Byton**

Foxconn and the Nanjing Economic and Technological Development Zone have agreed to start building electric sport-utility vehicles in 2022 for cash-strapped Chinese startup Byton, Foxconn reported. Young Liu, chairman of Foxconn, said in the statement that the partnership with Byton will be a key part in Foxconn's strategy in the electric vehicle (EV) industry. Foxconn's deal with Byton, its most concrete foray into the auto sector, amplifies the threat to established automakers that technology companies such as iPhone maker Apple and other non-traditional players could use contract assemblers as a shortcut to compete in the vehicle market.

## **North American EMS Industry Sales up 8.5 Percent in December**

IPC announced December 2020 findings from its North American Electronics Manufacturing Services (EMS) Statistical Program. The book-to-bill ratio stands at 1.10. Total North American EMS shipments in December 2020 were up 13.5 percent compared to the same month last year. Compared to the preceding month, December shipments rose 8.5 percent. EMS bookings in December rose 13.2 percent year-over-year but decreased 5.2 percent from the previous month.

## **Smartphone Shipments Return to Positive Growth in the Fourth Quarter Driven by Record Performance by Apple, According to IDC**

The smartphone market continued to improve in 4Q20 with 4.3% year-over-year growth. According to preliminary data from the International Data Corporation, smartphone vendors shipped a total of 385.9 million devices during the quarter. While the full year 2020 declined 5.9% compared to 2019, the progress toward market recovery has been impressive and IDC believes the momentum heading into 2021 will remain strong.

# ***World Telecom Connector Market 2020 - 2025***

The World Telecom Connector Market 2020 - 2025 is Bishop & Associates newest research report. This nine chapter, 254-page, research report provides a detailed analysis of the connectors used in the six key telecom sub-sectors; enterprise equipment, wireless infrastructure, wireless subscriber, carrier network, cable/MSO network, and other telecom equipment. Connector statistics are provided by year, region, sub-sector, connector type and more than 60 different equipment types.



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 result, this connection has increasingly becoming a wireless one.

Trends like this show how consumers will drive the need for updated mobile networks. In particular, upgraded mobile connection technology – 4G LTE, 5G and beyond, as well as enhanced Smartphones.

Questions addressed include:

- ❖ What factors will contribute to the IP centric trend?
- ❖ What factors are driving growth in the market?
- ❖ How is 5G changing the equipment landscape?
- ❖ Which region will show the greatest increase over the forecast period? Will any of the regions show a decline?
- ❖ Within the five primary telecom equipment categories, where is the greatest potential for growth. Which primary equipment category has the greatest potential to decline over the forecast period?
- ❖ Which connector types will benefit most significantly from an increase in telecom equipment sales? Will any connector types see a decrease in demand?



# World Telecom Connector Market 2020 - 2025

The following tables show examples of the type of tables and data provided in this report. This data is provided for connector sales by telecom sub-sector and by region for the years 2019 through 2025, with a five-year CAGR.

**Connector Telecom Sales by Primary Equipment Category  
2019 through 2025**

Category	2019	2020	2021	2022	2023	2024	2025	5 Year CAGR
Enterprise	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Wireless Infrastructure	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Wireless Subscriber	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Carrier Network	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Cable/MSO	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Other	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>xx%</b>

\$ Millions

**Connector Telecom Sales by Region  
2019 through 2025**

Region	2019	2020	2021	2022	2023	2024	2025	5 Year CAGR
North America	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Europe	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Japan	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
China	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
Asia Pacific	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
ROW	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	\$XX	XX%
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>XX%</b>

\$ Millions

# World Telecom Connector Market 2020 - 2025

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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 <https://store.bishopinc.com>.

- ☐ **Report M-510-21**      **World Telecom Connector Market 2020-2025 (January 2021) NEW**
- ☐ **Report M-1601-20**      **Top 50 Medical Interconnect Solutions Companies (December 2020) NEW**
- ☐ **Report P-675-20**      **High-Speed Copper & Fiber Optic Connectors (November 2020) NEW**
- ☐ **Report F-2020-02**      **Connector Industry Forecast (October 2020) NEW**
- ☐ **Report M-980-20**      **5G Infrastructure – How 5G is Impacting Infrastructure Hardware and Connector Buying Trends (September 2020) NEW**
- ☐ **Report M-121-20**      **2020 Top 100 Connector Manufacturers (August 2020) NEW**
- ☐ **Report M-1501-20**      **Medical Electronics Market for Interconnect Solutions (July 2020)**
- ☐ **Report P-780-20**      **World RF Coax Connector Market 2020 (June 2020)**
- ☐ **Report C-122-20**      **2020 Connector Industry Yearbook (June 2020)**
- ☐ **Report M-799-20**      **2020 World Cable Assembly Market (May 2020)**
- ☐ **Report M-700-20**      **World Connector Market Handbook (April 2020)**
- ☐ **Report M-4100-20**      **Non-Automotive Transportation Market for Connectors (February 2020)**
- ☐ **Report P-606-19**      **Connector Types and Technologies Poised for Growth (October 2019)**
- ☐ **Report M-1010-19**      **World Automotive Connector Market (August 2019)**

### THE BISHOP REPORT - CONNECTOR INDUSTRY YEARBOOK

An annual subscription to [\*\*THE BISHOP REPORT\*\*](#) (12 issues) is available for \$1,750. *The Bishop Report* subscription includes access, through [Bishopinc.com](https://Bishopinc.com), to prior issues of The Bishop Report, 30-40 yearly News Briefs, Industry Financial Benchmarks, and various connector industry indices. In addition, your subscription will include the **Connector Industry Yearbook** report (normally \$1,500).

An annual **Corporate Subscription** is available for \$2,950, which includes an unlimited number of subscribers and one PDF version of the **Connector Industry Yearbook**.

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



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