



## Europartners World-Wide Electronic Component Distribution Report 2010 20<sup>th</sup> Year of Publication

**The report is an in-depth study prepared by people who have a deep involvement with the electronic component industry.**

Each country report is written by locals who have detailed knowledge of the electronic component distribution industry. These reports analyse the market split into semiconductors, passives and electromechanical components and component assemblies.

This will be its 20th year of publication. Last year's report was sold to component manufacturers, component distributors, major equipment manufacturers, contract manufacturers and the financial communities across the world.

The 2010 report has been re-written and contains details of the overall European and International component distribution scene, with profiles of major pan-European groups: Acal, Arrow, Avnet, Electrocomponents, Future, Farnell, MSC, Rutronik and TTI.

**The 800 plus page European Report, contains the following information for Austria, Benelux, Denmark, Finland, France, Germany, Hungary, Italy, Norway, Poland, Russia, Sweden, Switzerland and UK.**

An introduction to the market in that particular country with detailed information on:

- the Distribution Total Available Market (DTAM) and the Total Available Market (TAM) for 2007, 2008 and 2009, split into semiconductors, passive and electromechanical components.
- a summary on distribution events in 2009 in that country
- detail of Mergers and Acquisitions within the past year.

Details of the top 10 electronic component distributors in each country including:

- Sales of each company in the country for the last 3 years split into semiconductors, passives and electromechanical components. PC market sales shown separately where relevant.
- Historical summary of each company, i.e., when formed, buy-outs, mergers, plus ownership details.
- Name/Address/Phone/Fax/email/web details plus names of key managers.
- Franchise listing by major product category

Details of other significant distributors in the market including:

- Name/Address/Phone/Fax/email/web details.
- Ownership.
- Brief description of business.
- Market coverage.
- Approximate sales revenue for the last 3 years split into semis, passives and e-mech.
- Franchise listing.

All revenues for European countries are summarised in two currencies, the Euro and the US\$. European countries that are not within the Euro are shown additionally in local currency.

**All reports are in English.**

# EXTRACTS FROM THE 2010 REPORT

## Extract from the Report for Germany

### Setron GmbH

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Web: [www.setron.de](http://www.setron.de)

Fiscal Year: Dec 31

Owner: Streiff & Helmold

Revenues for Calendar Year	2007		2008		2009	
	Mill €	Mill \$	Mill €	Mill \$	Mill €	Mill \$
<b>Sales</b>						
<b>Semiconductors</b>	30.0	41.1	28.5	41.9	21.4	29.8
<b>Passives</b>	8.5	11.6	7.8	11.5	5.9	8.2
Other Emech	12.0	16.4	11.2	16.5	8.6	12.0
<b>Total Emech</b>	12.0	16.4	11.2	16.5	8.6	12.0
<b>Total Industrial Components</b>	50.5	69.2	47.5	69.9	35.9	50.1
<b>Total Company</b>	50.5	69.2	47.5	69.9	35.9	50.1

*\*Europartners Estimate*

### Organisation:

GF, MD:

Sales Manager:

Export:

Marketing:

Finance/Admin:

Michael Klammer

Stefan Schmalz

Isabella Dybe

Andreas Lausch

Susanne Seifert

Employees:

Offices:

Total 126, Sales 48, FAE 4, other 47

Germany 8, Austria 1, Poland 1, Russia 1,

Hungary 1, Other Europe 1

### History:

Since 1969, Setron has been an independent distributor for electronic components. The product range comprises components covering all areas, ranging from semi-conductor and passive components to electro-mechanical products. The logistics centre in Brunswick supplies customers from all industrial and commercial fields and commerce all over Europe. Setron constantly work on extending their activities in Europe.

## Extract from the Report for Norway

### Macroeconomy

Norway has a population of just below 5 Million. The economy in Norway is quite different from other European economies. Within one generation Norway changed from a traditional shipbuilding, forestry, fishing and farming country to a service driven economy. The main reason is the exploration and pumping of oil and natural gas out of the North Sea. Today, Norway is the third largest oil producer worldwide and has one of the highest incomes per capita. The key industry besides oil and gas is still the marine industry. Norway holds or controls the third largest fleet in the world. Around these basic sectors the country has attracted high technology companies over the years: marine engineering, ecology engineering and telecommunication are growing strongly. After a decade of economic prosperity there are signs of a more moderate development in the Norwegian economy.

There has been a strong increase in investments in the past five years, which has resulted in a major build-up of capital stock in mainland industries. Together with weaker economic growth, this is likely to result in lower investment growth in the years to come. There has been a moderate increase in petroleum investments in the past years, and this development is expected to continue. The considerable increase in housing investments at the start of the current boom has continued, albeit at a slower pace. We expect the housing investments to decrease somewhat in the time ahead, but in a historical perspective the housing development is likely to remain at a high level. We expect a somewhat lower growth in house prices than in general prices in the next few years.

### Electronics Market

The Norwegian electronic market is small compared to other European countries. The niches for high-end technologies are in military and marine equipment, off-shore oil and other energy technologies as well as engineering equipment. Power supplies and even some high-end consumer products are also manufactured in Norway. All electronic companies are small to medium sized. The many small specialized customers normally expect to get service from locally situated distributors.

### Component Market

Europartners Consultants estimate the total component market in Norway 2009 to be 2453 MNOK which translates into 281 M€ or 391 M\$. This market estimate is based on facts and data gathered from distributors and Norwegian branches of components suppliers together with other available sources of market information. The historical figures are not compensated for currency fluctuations over time.

Total Component sales	2005	2006	2007	2008	2009
(TAM) in MNOK	2 760	2 900	3 010	3 100	2 453
Change % from prev. year	+ 0.6%	+ 5.1%	+ 3.8%	+ 3.0%	- 20,9%

*Please note that these figures are TAM = Total purchases by end customers through distributors and direct from manufacturers.*

### Product Families

Europartners Consultants separate the market figures in the report into four different product families, semiconductors, passive components, electro mechanical components and component assemblies. Please note that these figures are Europartners estimates of the (TAM) total purchases by end customers through distributors and direct from manufacturers.

### Semiconductors

Semiconductors	2005	2006	2007	2008	2009
TAM in MNOK	1 310	1 280	1 290	1 280	1 001
Change % from prev. year	+ 6.2%	- 2.3%	+ 0.8%	-0.8%	- 21,8%

## Extract from the European Overview

### TTI Europe

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Web: [www.ttieurope.com](http://www.ttieurope.com)

**Owner:** TTI Inc. Fort Worth Texas, USA

Revenues for Calendar Year	2007		2008		2009	
	Mil €	Mill \$	Mil €	Mill \$	Mil €	Mill \$
Sales						
Semis	0.00	0	0.00	0	2.00	2.9452
Passives	173.00	217.34	184.50	252.97	134.90	198.65
Connectors	68.50	86.06	74.40	102.01	70.00	103.08
other Emech	0.00	0.00	0.00	0.00	0.00	0.00
Tot E mech	68.5	86.06	74.4	102.01	70.0	103.08
Total Component Assemblies	0.0	0.00	0.0	0.00	0.0	0.00
Total Components	241.5	303.40	258.9	354.98	206.9	304.68
Memory MPU zo PC Mkt.	0.00	0.00	0.00	0.00	0.00	0.00
Non Components	0.00	0.00	0.00	0.00	0.00	0.00
Total Company	241.5	303.40	258.9	354.98	206.9	304.68

*\*All Figures are Europartners Estimates*

#### 2009 European Component Sales by Country in €m

Austria	6.10	Poland	2.50
Benelux	8.20	Spain/Portugal	6.10
Czech Republic	2.50	Sweden	8.90
Denmark	6.10	Switzerland	4.90
Finland	0.80	UK & Ireland	21.00
France	30.00	Others	
Germany	75.40	Total Europe	206.9
Hungary	7.50	Israel	
Italy	26.10	Russia	0
Norway	0.80	TOTAL EMEA	206.9

#### History:

TTI Inc. was founded in 1971. As a specialty distributor for passive and electro-mechanical components the company has developed to a leading company in that segment in the US. In the mid nineties TTI started their activities in Europe. They have grown quickly and today report \$280 Million in Europe. In December 2007 TTI Inc. was aquired by Berkshire Hathaway Inc, an US Investment Fond. Berkshire is recognized as being one of the most admired companies in the world and take a long term view of the business and will allow TTI to continue with their growth plans.

#### Organisation:

MD	Glyn Dennehy
VP Sales Europe	Jean Quecke
VP Operation	Thomas Rolle
VP Marketing	Geoff Breed
Director Finace	Klaus Widmann

Employees European wide	430
Sales Offices European wide	31

#### Current Operation and Strategy:

TTI keeps the focus on passive and electro-mechanical components. A wide offer of value-added services and technical competence support their growth. The linecard shows many major manufacturers in the segment. A warehouse / logistic centre is located in Puchheim close to Munich. Due to the rapidly growing business a new 13,000 sq. metre facility was opened in Gemlinden,near Munich in 2005.

## REPORT PRICING & AVAILABILITY

REGION	REPORT NO.	£	€
<b>Full European Report ( Overview</b> <b>Europe:</b> Austria, Benelux, Denmark, Finland, France, Germany, Hungary, Italy, Norway, Poland, Russia, Sweden, Switzerland, UK.	DIS-EUR-2010	4350	5100
<b>Single Country Report ( price per country)</b> Germany, France, Italy, Russia, Sweden, UK, (incl. overview).	DIS-Country-2010 <i>(please specify country)</i>	870	1025
<b>Single Country Report ( price per country)</b> Austria, Benelux, Denmark/Norway, Finland, Hungary, Poland, Switzerland (incl. overview).	DIS-Country-2010 <i>(please specify country)</i>	725	850

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European Report (if ordered subsequently)	215	250
Single country report (if ordered at time of original order)	76	90
Single country report (if ordered subsequently)	105	125

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**Email: [kell@eworld.ru](mailto:kell@eworld.ru)**

## Electronic Component Distribution Report 2010 Order Form

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