



# Europartners World-Wide Electronic Component Distribution Report 2009 19<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 19th 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 2009 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 1000 plus page Worldwide Report, contains the following information for Austria, Benelux, China, Denmark, Finland, France, Germany, Hungary, Italy, Japan, Mexico, Norway, Poland, Russia, Sweden, Switzerland, UK and USA.**

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 2006,2007 and 2008, split into semiconductors, passive and electromechanical components.
- a summary on distribution events in 2008 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. Other countries are shown in US\$.

**All reports are in English.**

# EXTRACTS FROM THE 2009 REPORT

## Extract from the Report for Austria

**INELTEK Ges.m.b.H.**

**Austria Rank #10**

Schloesselgasse 1,A-2000 Stockerau

Tel: +43-2266/98 251-0

Fax: +43-2266/98 251-20

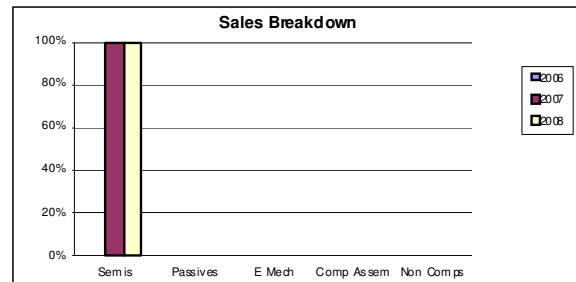
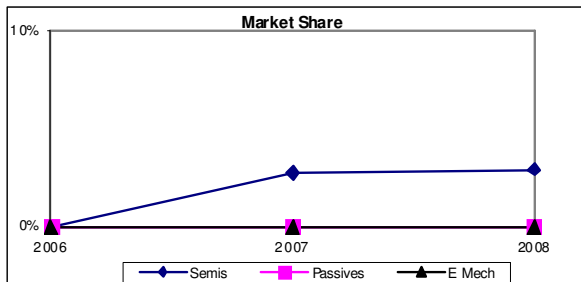
E-Mail: [office@ineltek.at](mailto:office@ineltek.at)

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

Fiscal Year: Sep 30

Owner: Bernhard Sonnentag

Revenues for Calendar Year	2006		2007		2008	
Sales	Mill €	Mill \$	Mill €	Mill \$	Mill €	Mill \$
<b>Semis</b>	0.0	0.0	4.2	5.8	4.0	5.9
<b>Passives</b>	0.0	0.0	0.0	0.0	0.0	0.0
Connectors	0.0	0.0	0.0	0.0	0.0	0.0
Other E Mech	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total E Mech</b>	0.0	0.0	0.0	0.0	0.0	0.0
Display	0.0	0.0	0.0	0.0	0.0	0.0
Power	0.0	0.0	0.0	0.0	0.0	0.0
Optoelectronics	0.0	0.0	0.0	0.0	0.0	0.0
Other Assemblies	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total Component Assem</b>	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total Components</b>	0.0	0.0	4.2	5.8	4.0	5.9
Memory & MPU to PC Mkt	0.0	0.0	0.0	0.0	0.0	0.0
Non Components	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total Company</b>	0.0	0.0	4.2	5.8	4.0	5.9



\*Europartners estimates

## History

Since its establishment in 1987, INELTEK GmbH at Heidenheim an der Brenz has grown to become one of the leading distributors of microelectronic devices. Because it is owned by private investors INELTEK is extremely flexible and responds quickly to the ever changing challenges of the market. INELTEK is member of the European wide operating ATEG, a consolidation of European Distributors

## Organisation

Management: Bernhard Sonnentag MD  
 Sales: Gerhard Pracher Director  
 Marketing: Roland Becker Director  
 Sales Office: Austria : 1

## Operations and Strategy

Because it's owned by private investors, INELTEK is extremely flexible and responds quickly to the ever changing challenges of the market. INELTEK is a representative and a distributor of leading manufacturers of semiconductors and maintains a network of subsidiaries in Germany as well as in other countries to ensure competent on-site customer service as well as efficient supply of all products through a logistics centre. As an ISO 9002 certified company, INELTEK strongly emphasizes quality and quality assurance within the scope of its enterprise philosophy.

## Advanced Technology Group (ATeG)

The Advanced Technology Group ("AteG") is an alliance of independent companies, which share common franchises for the design-led distribution of specialised electronic components. Principle companies in the alliance are as follows:  
 Ineltek GmbH (Germany)

Anatec AG (Switzerland).  
 Anatronc S.A. (Spain)

## Value Added Services & Logistic Solutions

Ineltek provides programming service for all current available logic - memory components and microcontrollers, to their customers.

## Franchises / Direct Trading Agreements: \* Full details of franchises are shown.

### Extract from the Overview

**TTI**

**European Rank: # 6**

Ganghoferstr.34,D-82216 Maisach-Gernlinden, Germany

Tel: +49 (0) 8142 668 00

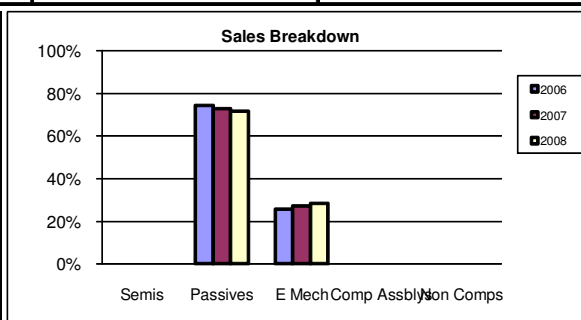
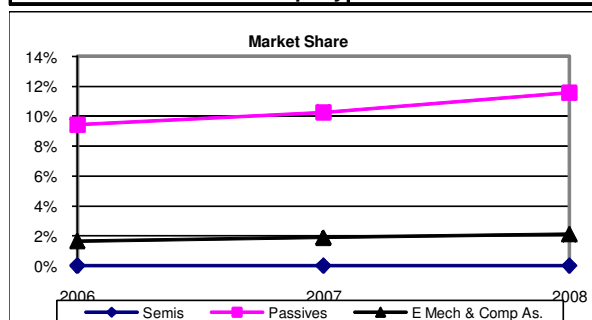
Fax: +49 (0) 8142 668 049 0

Email: [sales@de.ttiinc.com](mailto:sales@de.ttiinc.com)

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

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

Revenues for Calendar Year	2006		2007		2008	
Sales	Mill €	Mill \$	Mill €	Mill \$	Mill €	Mill \$
<b>Semiconductors</b>	0.0	0.0	0.0	0.0	0.0	0.0
<b>Passives</b>	159.6	198.7	175.7	220.7	185.5	254.3
Connectors	39.2	48.8	46.6	58.6	54.0	74.0
Other Emech	16.4	20.4	19.5	24.4	16.9	23.1
<b>Total Emech</b>	54.9	68.4	65.4	82.2	73.3	100.6
<b>Component Assemblies</b>	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total Industrial Components</b>	214.5	267.1	241.1	302.9	258.8	354.9
<b>Non-Components</b>	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total Company</b>	214.5	267.1	241.1	302.9	258.8	354.9



\*All Figures are Europartners Estimates

### 2008 European Component Sales by Country in €m

Austria	7.00	Poland	3.00
Benelux	9.00	Spain/Portugal	8.50
Czech Republic	1.50	Sweden	16.00
Denmark	10.50	Switzerland	5.50
Finland	1.50	UK & Ireland	19.00
France	41.00	Others	
Germany	93.00	Total Europe	259.00
Hungary	9.00	Israel	
Italy	33.00	Russia	0
Norway	1.50	TOTAL EMEA	259.00

### Organisation and Management:

Management: Glyn Dennehy MD

Management: Jean Quecke VP Sales Europe

Management: Thomas Rolle VP Operation

Marketing: Geoff Breed VP Marketing

Finance: Klaus Widmann Director

Employees European wide: 470

Sales Offices European wide: 31

## 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.

## Operations and Strategy:

*\*An overview of these is included in the full report*

### Extract from the Report for China

#### AN OVERVIEW OF CHINA'S ELECTRONICS INDUSTRY

##### China's domestic market is key to survival of the economy

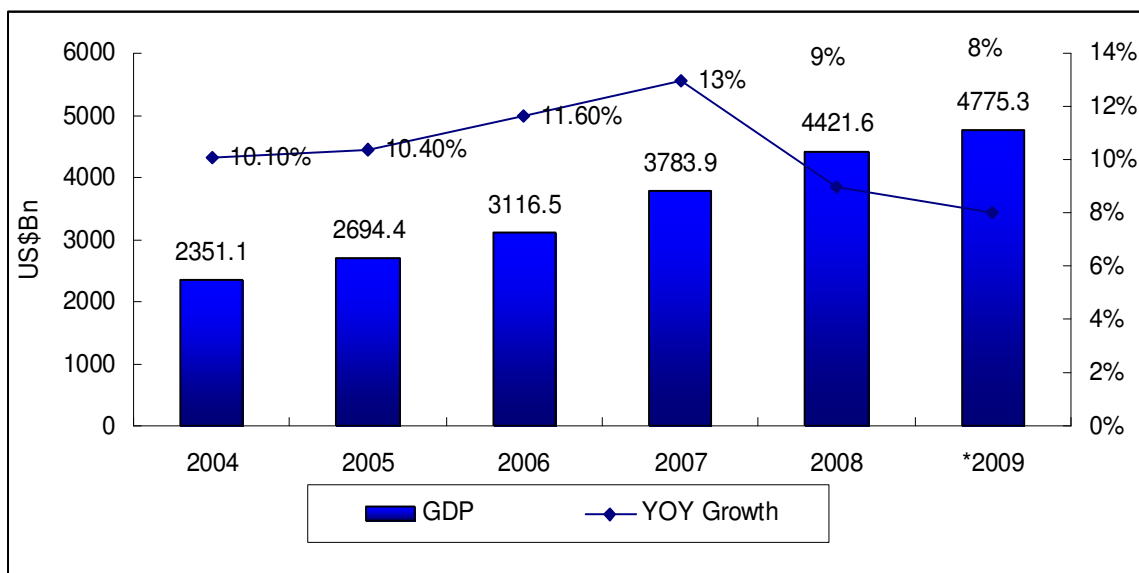
2009 is the fourth year of China's 11<sup>th</sup> five-year plan that lasts until 2010. Domestic market demand becomes of top importance for the nation in recovering its economy.

In 2008, the Chinese government took strong action to control the overheated economy and avoid further inflation; including new labour law, value-add tax (VAT) rebate change, bank interest increase and tight bank loan policies. The initiative of government was to restructure the nation's economy and involve more technology development activities in China's manufacturing sectors. However, the result was the dramatically increased company cost and the shut-down of many companies when overseas market demand declined in the second half of 2008.

##### GDP still expects to grow 8% in 2009

The Chinese government plans to grow GDP 8% year over year(YOY) to reach US\$4775.3bn in 2009 through economy stimulation policies and government investment initiatives, but economists forecast a modest 7.5% GDP growth. And the forecast from the World Bank for China's GDP is 6.5% YOY growth,

**Chart 1: 2004-2009 China's GDP YOY Growth**



*\*Source: China's National Statistics Bureau*

*\* Forecast*

The above chart is based on the March 2009 data from China's National Statistics Bureau.

In 2008, China's GDP grew 9% year over year (YOY) to reach US\$4421.6bn, lower than the previous estimate of 10.8% growth rate. This is because of sluggish global economy heavily impacting on Chinese exports starting from the Q3 2008. The last quarter of 2008 was extremely low due to slumping exports. However, the December figures climbed slightly over October and November.

It is too early to expect recovery since economists forecast Q1 of 2009 is going to be the worst, but the second half of 2009 will see an upturn based on economists' discussion in March.

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