



Technical Seminar Series

Be Smart — Choose the Right Part

Welcome to “Don’t Get Your Signals Crossed!”



Listen as connector guru, John C. Colwell from Bishop & Associates, Inc. and product experts from Amphenol RF, Molex and Tyco offer insight and advice on the latest technologies and applications for RF connectors.

You don’t want to get your signals crossed, so sit back, relax and learn more about RF connectors.



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Be Smart — Choose the Right Part

Welcome – Lew LaFornara, TTI, Inc.

Technology Line-Up

Bishop & Associates, Inc.

- John C. Colwell

Amphenol RF

- Don Watterworth

Molex RF Division

- John Garing

Tyco

- David Gravina

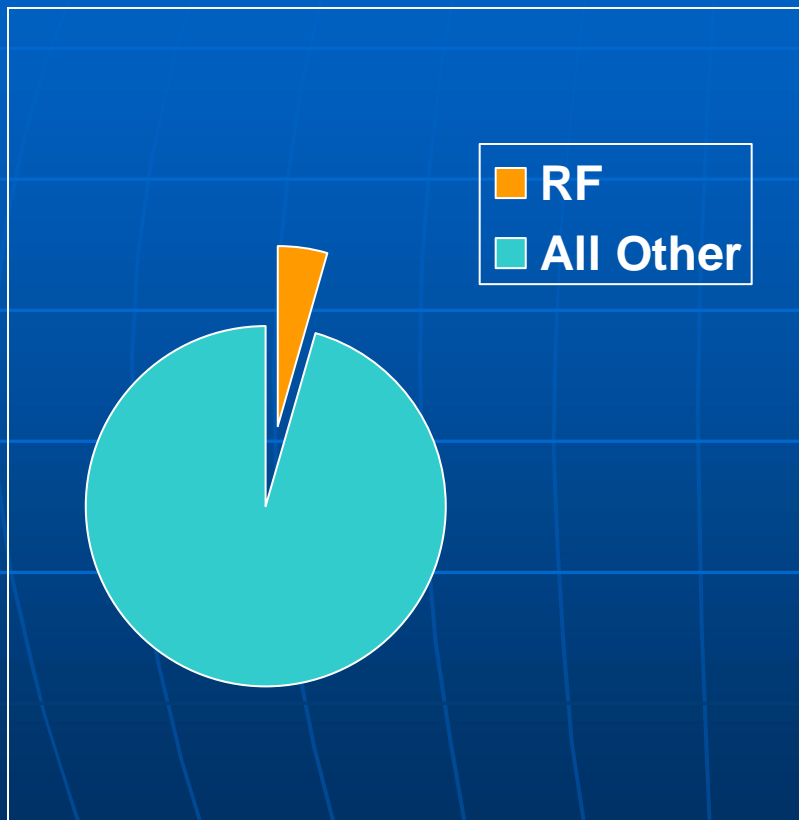
Q&A

RF Connector Market Overview

By
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World Market for Connectors - 2005



- Total value of connector shipments: \$35,484 million
- RF connector shipments: \$1,561 million
- Representing 4.4 % of total connector shipments

RF Connectors – History & Forecast

Value of Factory Shipments - \$US Millions



History



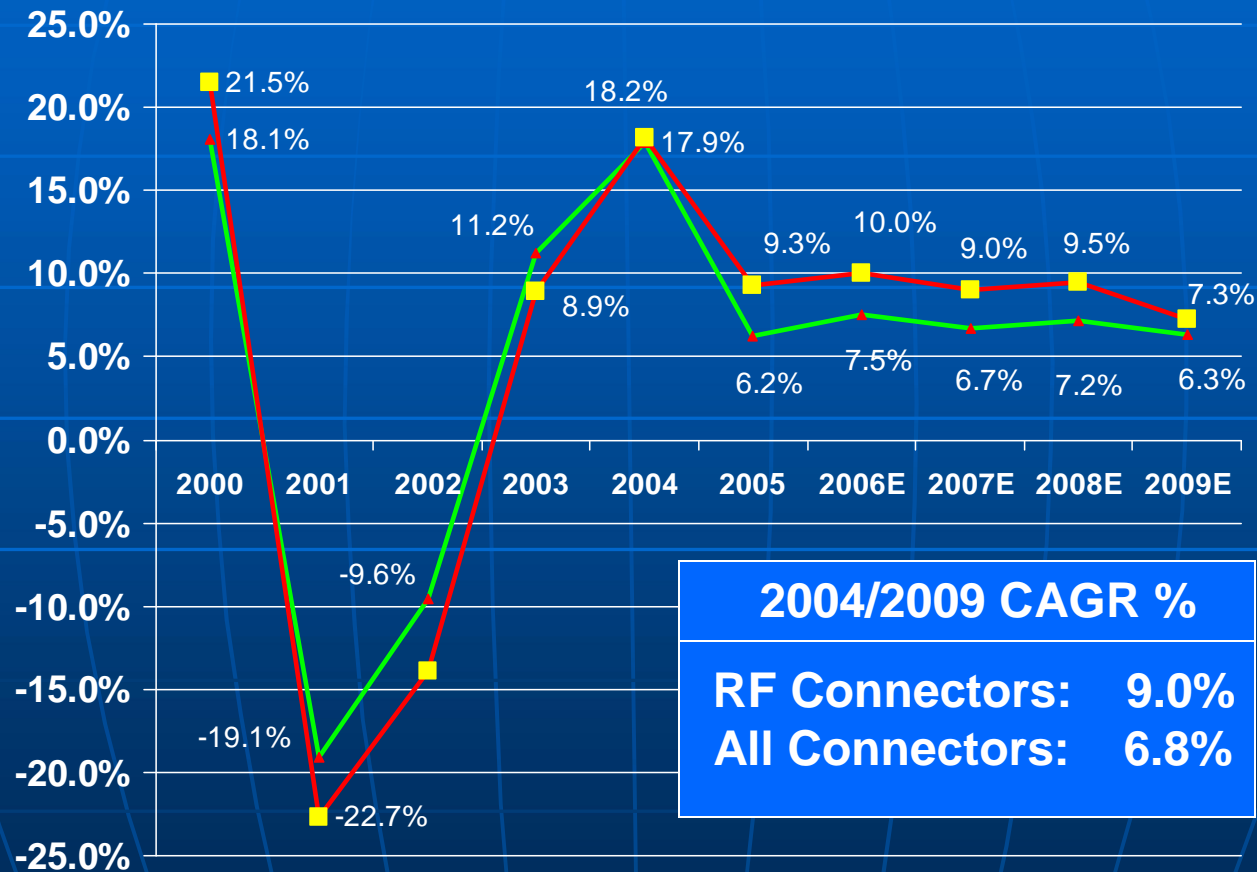
Forecast



Comparative Growth Rates

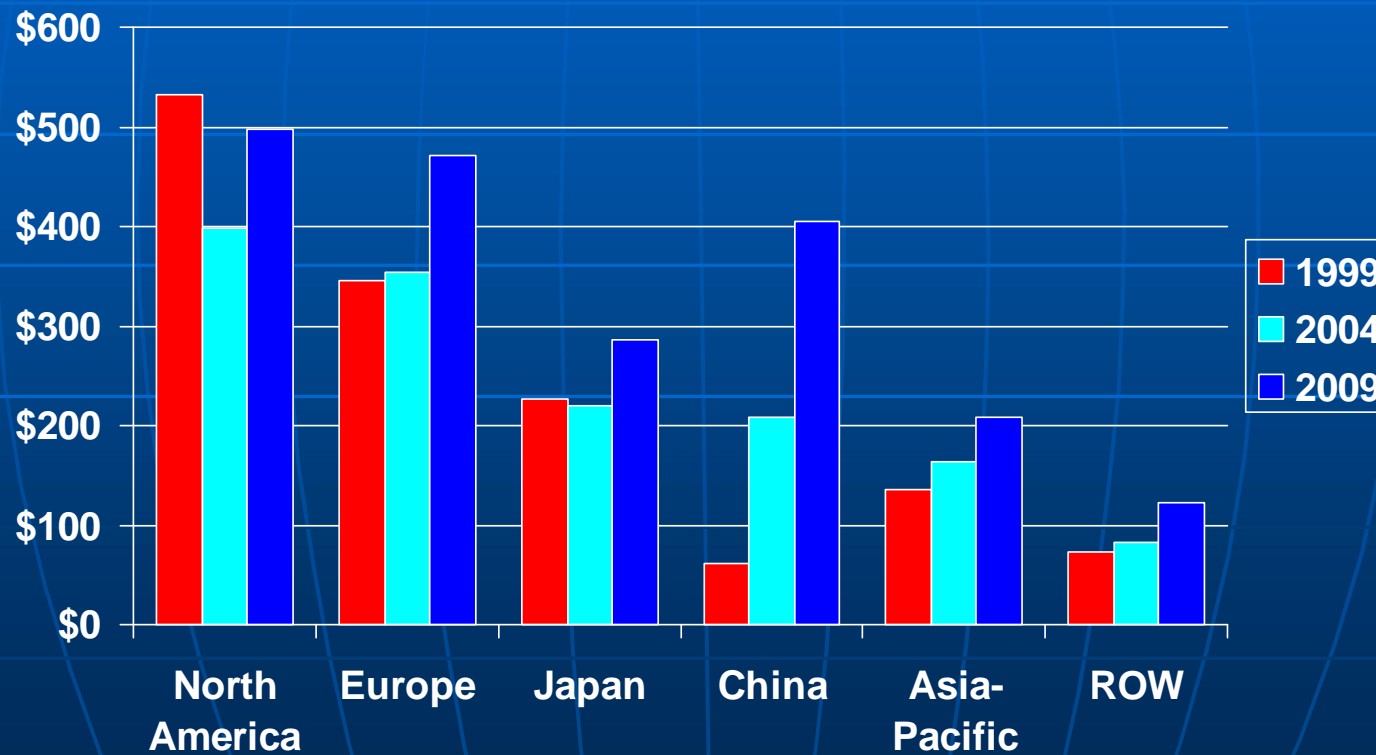
RF Connectors

All Connectors

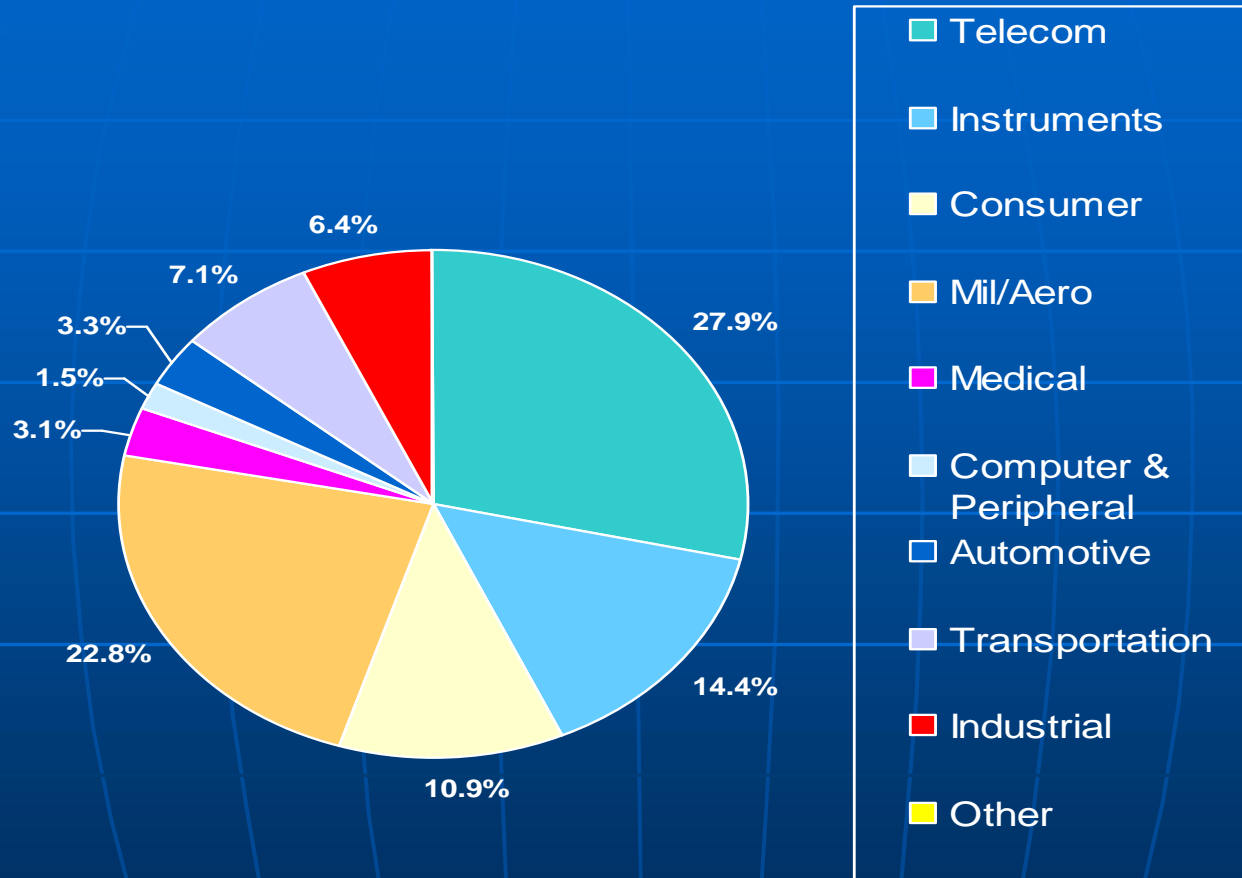


RF Connectors - Regional Shifts

Value of RF Connector Factory Shipments
\$US - Millions



End Use Markets - 2005



Market Drivers: 2006 - 2010

- Global passion for mobility
- Silicon integration & nano-scale packaging
- Continued proliferation of wireless communication technologies
 - Wireless infrastructures
 - Personal communications devices
 - Residential/ Small Office
 - Enterprise
- Growth of RF applications in the automotive electronics sector
 - Navigation and instruments
 - Entertainment & communications
- Other drivers:
 - Military-Aerospace
 - Surveillance-security systems
 - Instruments

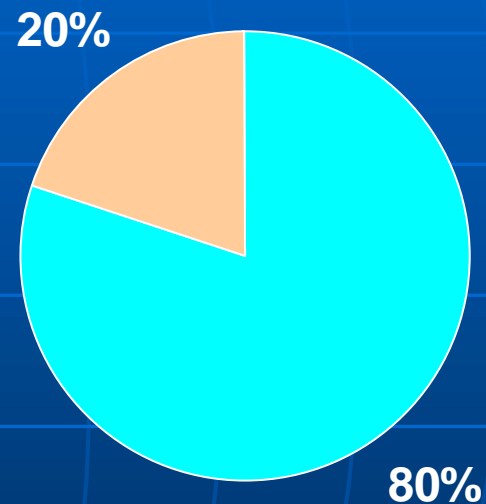
RF Market Characteristics

- Highly standardized
- Commodity products?
- Customer-specific adaptations of standard products
 - Mechanical variations
 - Plating and metallurgy
 - Special test requirements
 - Customer-specific part numbers
- Stable supplier-customer relationships
 - Vendor and item qualification
 - Vendor-specific part numbers
 - History of collaboration and confidence

RF Market Characteristics

- Very high concentration of RF connector sales
 - Seventeen suppliers provided 80 percent of the world's total RF connector consumption in 2005.
 - The remaining 20 percent of RF connector consumption is provided by the approximately thirty-five remaining RF connector suppliers.

Remaining 35 Vendors



Top 17 Vendors

Conclusion

- RF connectors is a small but important part of the total connector industry.
- Due to the high concentration of sales, it represents very significant business for the industry leaders and challengers alike.
- Lastly, the forecast growth rate for RF connectors is expected to outperform the connector industry throughout the remainder of this decade.
- Thank you.