

TABLE OF CONTENTS

RESISTOR NETWORK MARKETS: 2004-2008	1
<i>A MARKET RESEARCH ANALYSIS COVERING WORLD MARKETS, TECHNOLOGIES & OPPORTUNITIES FOR MULTICHIP RESISTOR ARRAYS, SIPs, DIPs, AND IPDS</i>	
	1
TABLE OF CONTENTS	2
PRODUCT DEFINITIONS: SCOPE OF COVERAGE	7
TRADITIONAL SIP, DIP AND FLATPACKS	7
<i>Dual-In-Line Package Resistor Networks</i>	7
<i>Single-In-Line Package Resistor Networks</i>	7
<i>Surge Resistor Networks (Line Feed)</i>	8
<i>Integrated Passive Device Networks</i>	9
KEY TECHNICAL ECONOMIC CRITERIA.....	10
<i>Resistance Capabilities Comparison By Linear Resistor Type: 2004</i>	10
<i>Tolerance Capabilities Comparison By Linear Resistor Type: 2004</i>	10
<i>Power Capabilities Comparison By Linear Resistor Type: 2004</i>	10
<i>Configuration Comparison By Linear Resistor Type: 2004</i>	11
<i>Key Technical-Economic Criteria:</i>	12
<i>Resistance in Electronic Circuits (Ubiquitous Nature Of The Product Line):</i>	12
<i>Physical Size Equivalent to Resistance (Raw Materials Are Key Cost Factors In Production):</i>	12
<i>Miniaturization Trends:</i>	13
<i>Integration and Modularization Trends:</i>	14
<i>Thin Film Technology (NiCr, TaN)</i>	16
<i>Integrated Passive Devices</i>	17
<i>Flip-Chip Technology For DIP & IPD Networks</i>	17
<i>Impact of Lead-Free On Resistors</i>	17
TECHNOLOGY OVERVIEW	21
<i>Thick Film Technology:</i>	21
<i>Thin Film Technology:</i>	21
TECHNICAL INNOVATION IN THE INDUSTRY:	22
<i>Multi-chip Array:</i>	22
<i>Thin Film Integration:</i>	22
<i>Advanced Packaging:</i>	22
TECHNICAL THREATS FROM ALTERNATIVE TECHNOLOGIES	23
<i>Integral Passive Substrates:</i>	23
<i>Low Temperature Co-Fire Ceramics (LTCC):</i>	23
<i>Technical Opportunities In The Field:</i>	24
<i>Precious Metal Displacement:</i>	24
<i>Advanced Packaging:</i>	24
RESISTORS: GLOBAL STRATEGIC MARKET OVERVIEW	24
LINEAR & NON-LINEAR RESISTORS- GLOBAL UNIT SHIPMENTS BY TYPE: 1998-2003, 2004-2008.....	24
✓ THE READER NEEDS TO KNOW.....	25
<i>Global Value Shipments Linear & Non-Linear Resistors By Resistor Type: 1998-2003, 2004-2008</i>	25
✓ THE READER NEEDS TO KNOW.....	26
✓ THE READER NEEDS TO KNOW.....	27
<i>Average Unit Pricing For Linear and Non-Linear Resistors By Type: 1998-2003, 2004-2008</i>	28
✓ THE READER NEEDS TO KNOW.....	29
<i>Global Value of Capacitor Consumption By Resistor Type & World Region: 2002</i>	30
✓ THE READER NEEDS TO KNOW.....	31



Global Value of Resistor Consumption By Type and End-Use Market Segment: 2003..... 32

Global Consumption Value For Resistors By Circuit Application (Fixed Resistance, Circuit Protection, Sensing, Specialty): 2003 34

Linear and Non-Linear Consumption By Resistive Element/Technology Platform : 2003 35

Global Competitive Environment In The Resistor Industry: 2002/2003..... 36

Overall Market Share Data (Linear Vs. Non-Linear): 2003..... 37

Global Linear Resistor Sales & Market Share By Product Type: (Chip, Network and Through-hole): 2003..... 38

Global Linear Resistor Sales (Through-hole- Metal Film, Oxide, Foil, WW and Carbon)..... 39

GLOBAL RESISTOR NETWORK MARKETS: 1995-2003 40

Global Resistor Network Sales Value, Volume & Average Unit Price by Type: 1995-2003..... 44

Global Resistor Network Suppliers: 2003 Sales & Market Shares..... 46

Global Forecasts For Resistor Networks By Type: 2003-2008 46

MARKET STRATEGIES FOR RESISTOR MANUFACTURERS: 2004 48

Single Product Focus 48

Broad Product Line 48

High-Growth Product Portfolio 48

COMPETITIVE ANALYSIS:..... 48

Resistor Manufacturers By Product Type (Linear & Non-Linear: 2004 49

IMPORTANT MARKET ISSUES: 2004-2008..... 49

Pricing & Price Erosion: 49

Raw Material Usage and Supply Issues 50

Ruthenium Supply Issues:..... 50

Palladium Supply Issues (Low Ohmic Value Resistors) 50

Alumina Substrates: 51

Capacity Utilization Issues 2004: 52

Five Year Market Cycle Update:..... 52

The Shift To Value-Added and Application Specific Resistor Markets In The West:..... 52

The Mass Movement To China:..... 53

END-USE MARKETS FOR LINEAR & NON-LINEAR RESISTORS: 53

Global Changes In The High Tech Economy: 4Q 2003 through 1Q 2004 53

Mass Commercial End-Users For Linear & Non-Linear Resistors: Changes By Quarterly Revenue: 2002-2004..... 54

..... 55

Value-Added & Application Specific End-Users For Linear & Non-Linear Resistors: Changes In Quarterly Revenue: 2002-2004 56

INDIVIDUAL END-USE MARKET DATA: 58

Global Computer Markets: 2004-2008..... 58

Global Hard Disc Drive Markets:..... 60

Global Wireless Markets:..... 61

Consumer Audio and Video Markets: 62

Telecom & Datacom Infrastructure Markets:..... 63

Automotive Subassembly Markets:..... 64

Industrial Automation Systems & Drives Market: 66

Electric Transport System Markets:..... 67

Electric Motor Markets: 69

Global Electronic Lighting Ballast Markets & Manufacturers 70

Electronic Lighting Ballast Producers: 70

AC & DC Power Supply Markets: 73

Customer Base For Linear & Non-Linear Resistors..... 74

Major Power Supply Manufacturers And Key Production Plant Locations: 76

Specialty Power Conversion Markets:..... 76

White Goods Markets:..... 77

Top White Goods Suppliers and Unit Shipments: 2003 Estimates 78



Small Home Appliance Markets:..... 79
Medical Test & Scan Markets:..... 80
Medical Implant Markets:..... 81
Defense Electronics..... 85
Downhole Pump & Mining Electronics 86
Second Tier Suppliers: 87
TOP RESISTOR VENDOR PROFILES:..... 90

**REGIONAL DOMINATION IN TRADITIONAL RESISTOR NETWORK MANUFACTURING:
2000..... 90**

CHANGES IN THE THICK AND THIN FILM RESISTOR NETWORK MARKETS 90

**CHANGES IN GLOBAL MARKET SHARES FOR THICK FILM (SIP/DIP) MANUFACTURERS:
..... 93**

**CHANGES IN GLOBAL MARKET SHARES FOR THIN FILM RESISTOR NETWORK
MANUFACTURERS: 93**

THIN FILM MARKET BREAKOUT BY TYPE..... 94

RESISTOR NETWORK MANUFACTURER INFORMATION..... 95

VISHAY INTERTECHNOLOGY 95

Vishay Facility Thick Film Thin Film Total..... 95
VISHAY FOIL (HOLON/MALVERN) \$0.0 \$8.0 \$8.0 96

TT ELECTRONICS..... 96

PANASONIC..... 98

KOA CORPORATION (INCLUDES TAMA ELECTRIC)..... 98

TAMA PRODUCT 2000 REVENUES 98

CTS CORPORATION 99

MURATA MANUFACTURING LIMITED 100

SUSUMU/DELTA/CYNTEC/YOKOHAMA DENSHI: 100

OTHER JAPANESE PRODUCERS: 100

TAIWANESE- OTHER ASIAN PRODUCERS (SIPS)..... 101

DIP MANUFACTURERS (OPPORTUNITY FOR PRIVATE LABELLING) 101

**GLOBAL PRODUCT OFFERINGS IN TRADITIONAL THICK FILM RESISTOR NETWORKS:
..... 101**

THICK FILM RESISTOR NETWORK PRODUCT OFFERINGS BY COMPANY: 102

A OHM RESISTOR COMPANY (TAIWAN)..... 102

ABTEC ELEKTRONICA (SINGAPORE) 103

ABCO ELECTRONICS (JUNGWON-GU, SOUTH KOREA) 103

ALPHA ELECTRONICS {JAPAN} 103

AOI ELECTRONICS COMPANY LIMITED (KAGAWA, JAPAN)..... 103

BEIHAI YINHE HI-TECH INDUSTRIAL COMPANY LIMITED (GUANGXI, CHINA)..... 104

CADDOCK ELECTRONICS (CALIFORNIA, OREGON)..... 104

C.C. OHM ENTERPRISE COMPANY LIMITED {TAIWAN/CHINA} 104



CHIEN TUNG ELECTRONICS COMPANY LIMITED (TAO YUAN, TAIWAN)	105
CINETECH INDUSTRIAL COMPANY LIMITED (TAIPEI HSIEN, TAIWAN).....	105
CTS CORPORATION (BERNE, INDIANA, USA)	105
ELEKTRO TEKNIK (TEPRO) {GERMANY/USA}.....	105
ENDRICH BAULAMENTE VERTRIEBS GMBH {GERMANY}.....	106
FENG HUA ADVANCED TECHNOLOGY LIMITED (GUANGDONG, CHINA).....	106
FONG YA ENTERPRISE COMPANY LIMITED (TAIPEI HSIEN, TAIWAN).....	106
GENPAC INTERNATIONAL COMPANY LIMITED (TAIPEI, TAIWAN).....	106
GREAT LAND ENTERPRISE COMPANY LIMITED (TAIPEI HSIEN, TAIWAN).....	107
HIPOT (SLOVENIA).....	107
HOSONIC ELECTRONIC COMPANY LIMITED (TAIPEI, TAIWAN).....	107
KOA CORPORATION {JAPAN}.....	108
MAXITECH ELEKTRONIK AB (AKERSERGA, SWEDEN).....	108
MURATA MANUFACTURING LIMITED (JAPAN)	108
OHMCRAFT {USA}.....	109
PANASONIC (JAPAN).....	109
PANJIT/MERITEK CORPORATION {TAIWAN/USA}.....	109
PRECISION RESISTIVE PRODUCTS (MEDIAPOLIS, IOWA).....	109
REIDON COMPONENTS (ALHAMBRA, CALIFORNIA, USA).....	110
RHOPOINT COMPONENTS (SURREY, UK).....	110
RUF ELECTRONICS { HOEHENKIRCHEN, GERMANY}	110
SENDY ELECTRONIC COMPANY (KAOHSIUNG, TAIWAN).....	111
SMART ELECTRONICS INCORPORATED (SOUTH KOREA).....	111
SRT RESISTOR TECHNOLOGY GMBH (CADOLZBURG, GERMANY)	111
SUPERTECH ELECTRONIC COMPANY LIMITED (CHIAYI CITY, TAIWAN).....	111
SYNTON-TECH CORPORATION (NAN-KING, TAIPEI, TAIWAN).....	112
TAI ELECTRONIC COMPANY LIMITED (TAOYUAN, TAIWAN).....	112
TEH TONG ELECTRONIC COMPANY LIMITED (TAIPEI, TAIWAN).....	112
TT ELECTRONICS (BI TECHNOLOGIES) {USA/SCOTLAND}.....	112
UNIROYAL ELECTRONICS INDUSTRY COMPANY LIMITED (UNI-OHM) {TAIWAN}.....	113
USI (NAN-TOU, TAIWAN).....	113
VIBRANT DEVELOPMENT LIMITED (CHAI WAN, CHINA).....	113
VIKING TECH CORPORATION (TAIWAN)	114
VISHAY (COLUMBUS, NEBRASKA; MEXICO; VAN NUYS, CALIFORNIA).....	114
YAGEO CORPORATION {TAIWAN}	114
YESO {TAIWAN}.....	115



YUETONE INDUSTRIAL COMPANY LIMITED (TAIPEI, TAIWAN)..... 115
ZEALWAY (KAOHSIUNG, TAIWAN) 115
NOTES ON TAIWAN:..... 115
NOTES ON JAPAN:..... 115

