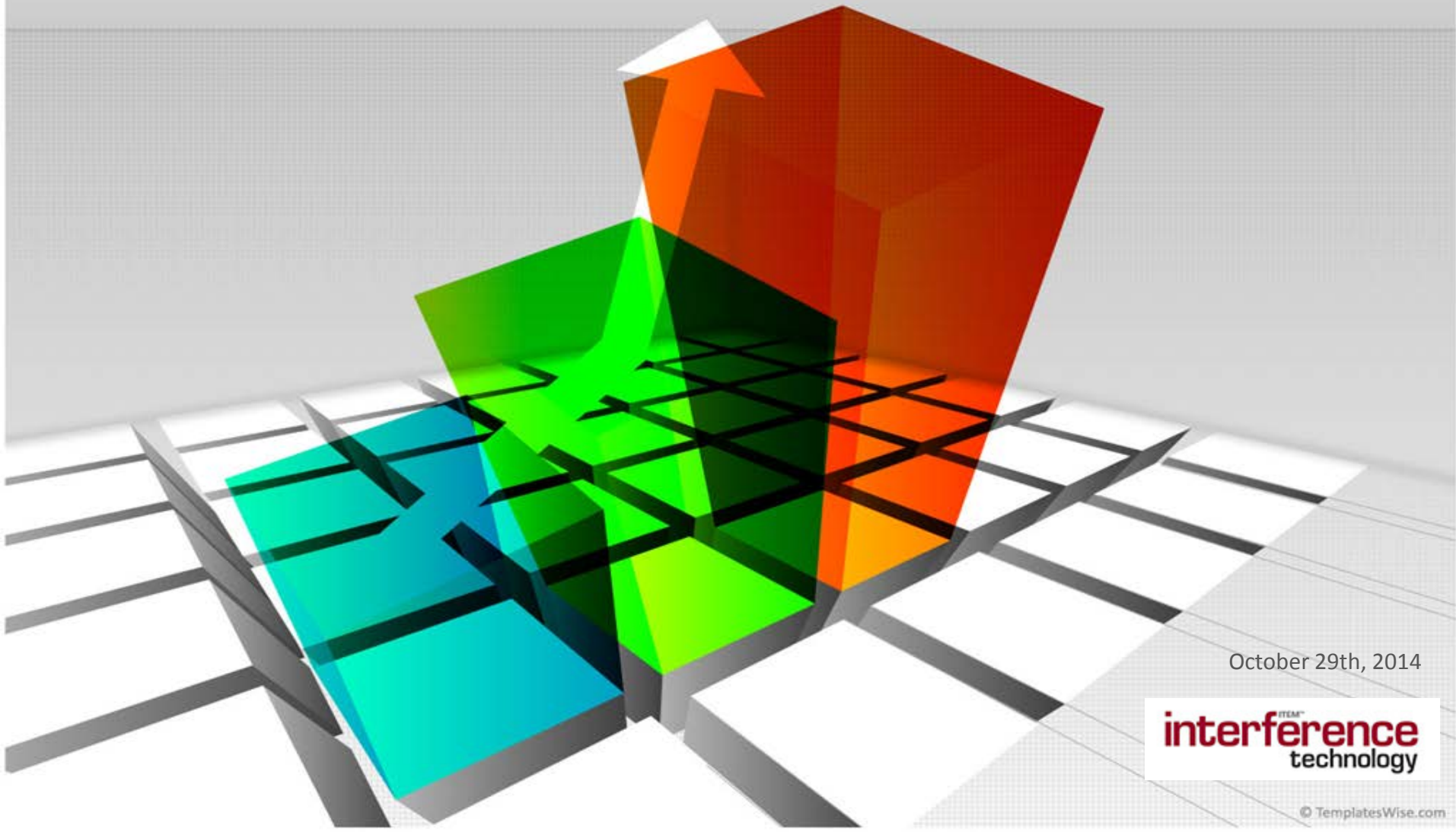
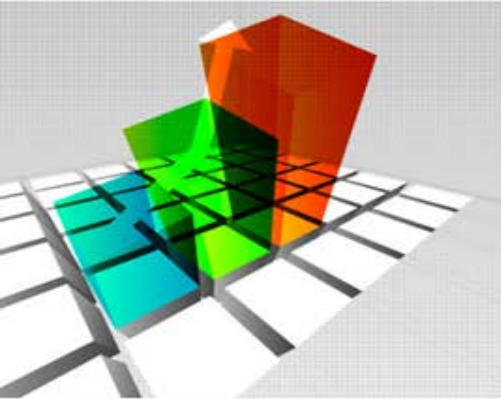


EMI-EMC Supplier Survey 2015



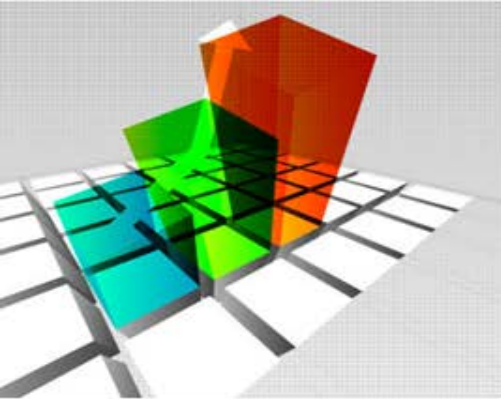
October 29th, 2014

interference^{TEAM}
technology



Introduction

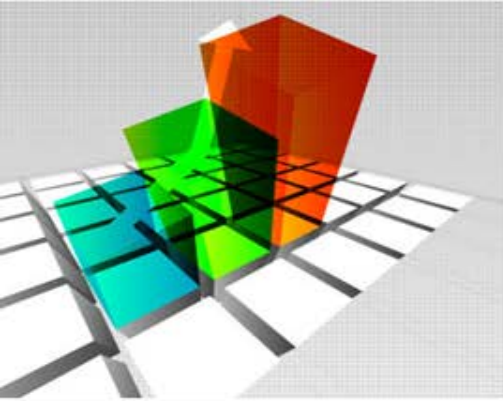
- September - October 2014
- Joint study of global EMC markets
- Looking at supplier confidence, growth /decline markets, and challenges



Methodology

	China	Europe	N. America
EMC Test Equipment (Test)	☆	☆	☆
EMC Components & Materials (Design)	☆	☆	☆

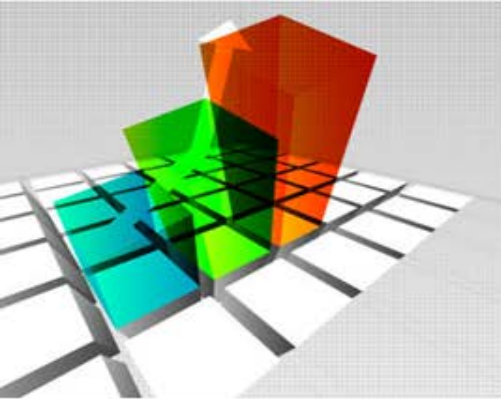
- 6 Sectors
- Email , Phone Calls, Online Survey
- Interviewed 44 people at 38 companies



2 Identification Questions

Q1. Select a Sector: Components & Materials or Test Equipment

Q2. Select a Region: China, Europe or North America



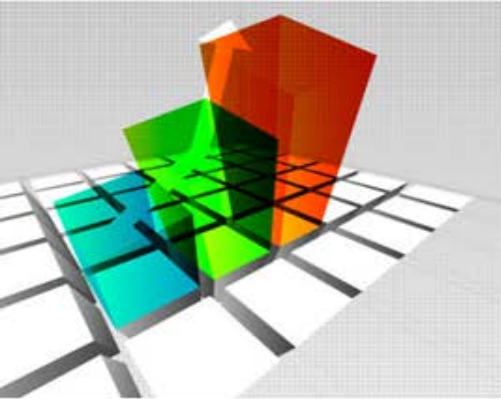
4 Survey Questions

Q1. Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?

Q2. Please rate the markets for *current* revenue for your company from 1 to 5 (1 least, 5 most)?

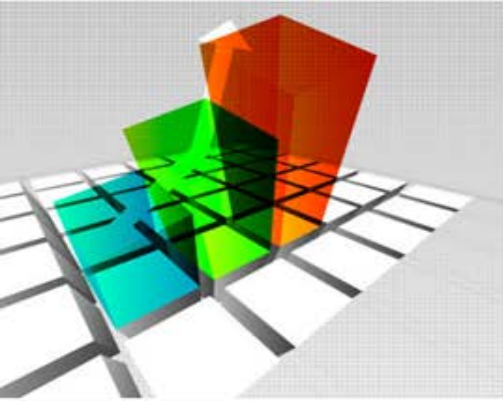
Q3. Please rate the markets for *future* growth potential for your company over next 12 months?

Q4. Please rate the areas that you feel will challenge your company's growth over the next 12 months?

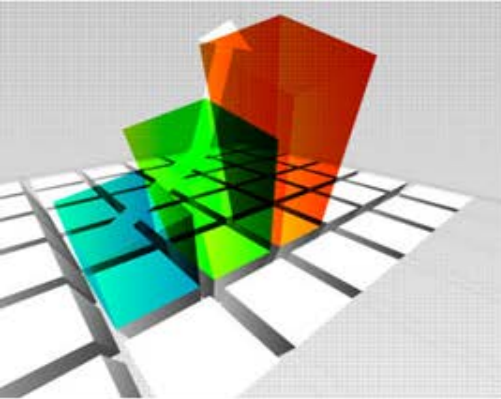


Methodology

- Rate each market 1 to 5
- 1 is low - 5 is high
- Average 8 companies per category responding
- High score, e.g. 40
- Low score, e.g. 10
- Companies who participated, anonymously, share the data.
- Others – highlights only



EMC Test Equipment Markets

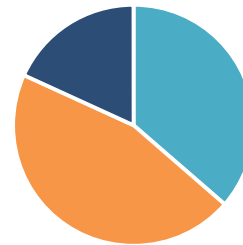


EMC Test Equipment: China

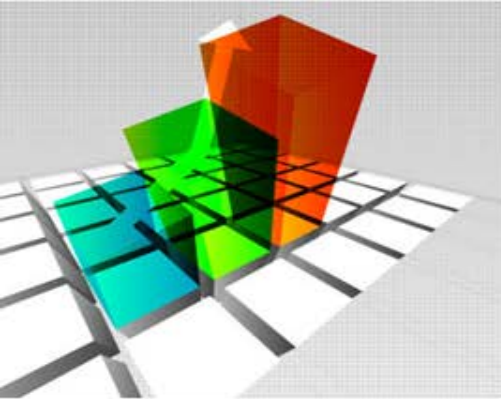
Q1: Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?

2015 Growth Prediction

China EMC Test Equipment Suppliers



■ Minus 20% or More ■ <10 ■ <5 ■ 0 ■ >5 ■ >10 ■ Plus 20% or More

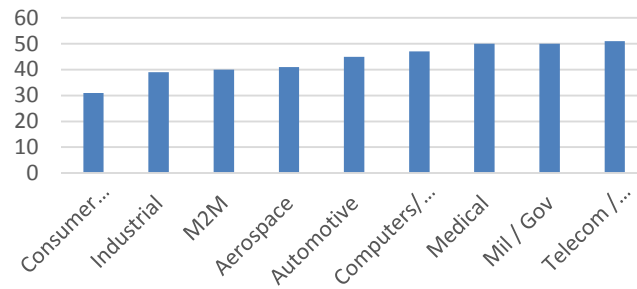


EMC Test Equipment: China

2014 ~ 2015 Comparison

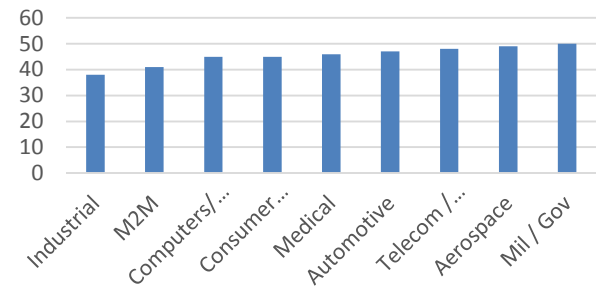
2014 Revenue Importance

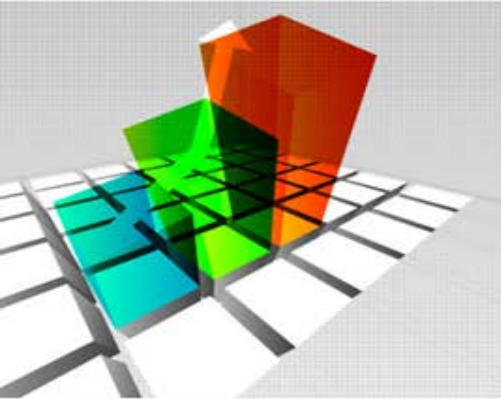
China EMC Test Equipment Markets



2015 Revenue Importance

China EMC Test Equipment Markets



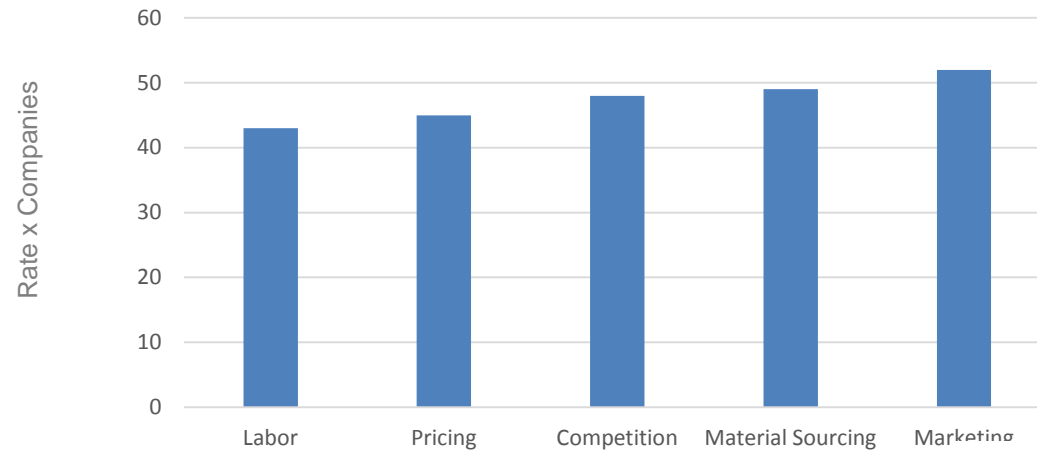


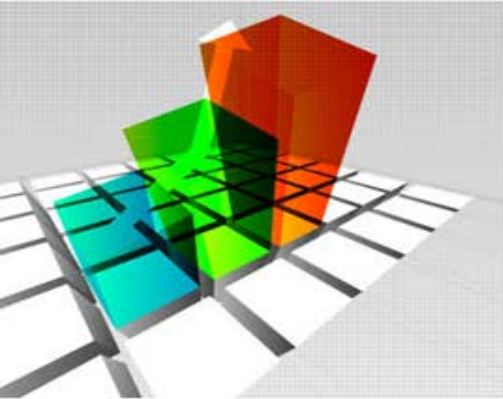
EMC Test Equipment: China

Q4: Please rate the areas that you feel will challenge your company's growth over the next 12 months?

2015 Challenges

China EMC test equipment Suppliers





EMC Test Equipment: Europe

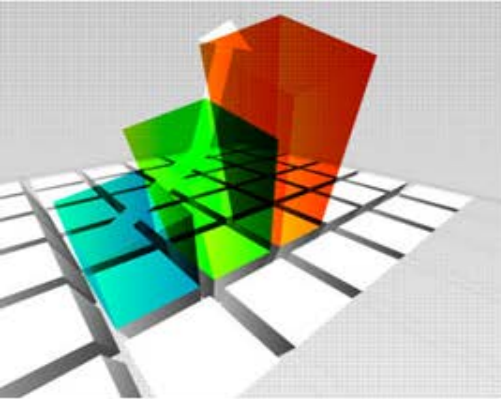
Q1: Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?

2015 Growth Prediction

Europe EMC Test Equipment Suppliers



■ Minus 20% or More ■ <10 ■ <5 ■ 0 ■ >5 ■ >10 ■ Plus 20% or More

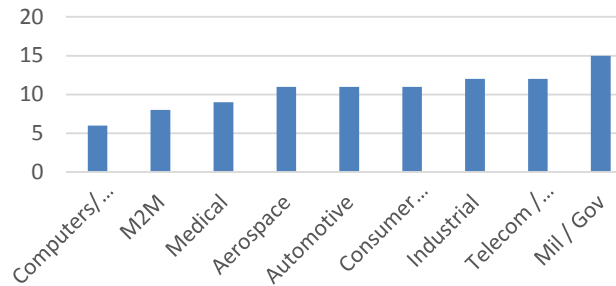


EMC Test Equipment: Europe

2014 ~ 2015 Comparison

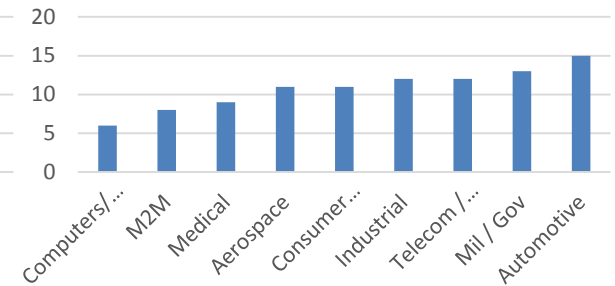
2014 Revenue Importance

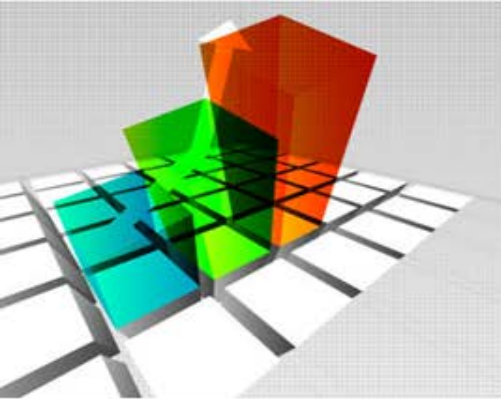
Europe EMC Test Equipment Markets



2015 Revenue Importance

Europe EMC Test Equipment Markets



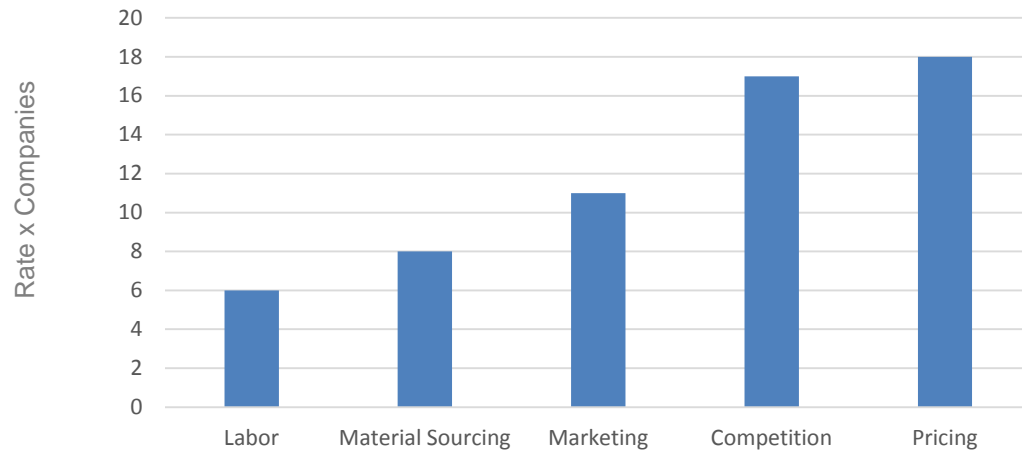


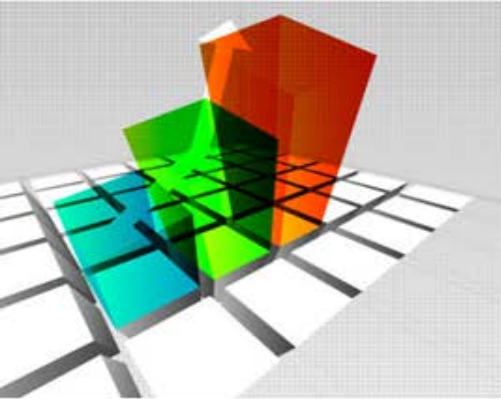
EMC Test Equipment: Europe

Q4: Please rate the areas that you feel will challenge your company's growth over the next 12 months?

2015 Challenges

Europe EMC Test Equipment Suppliers

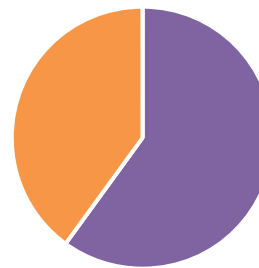




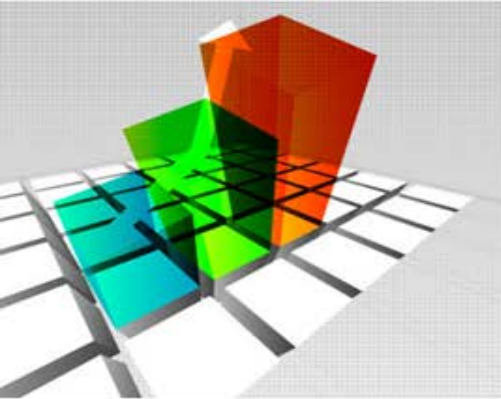
EMC Test Equipment: North America

Q1: Overall, what growth or decline are you forecasting for this product sector / region, over the next 12 months?

2015 Growth Prediction
North America EMC Test Equipment Suppliers



■ Minus 20% or More ■ <10 ■ <5 ■ 0 ■ >5 ■ >10 ■ Plus 20% or More

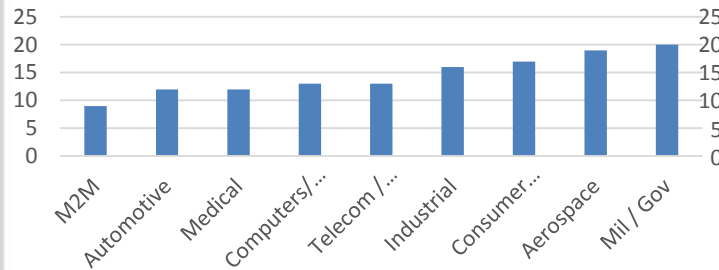


EMC Test Equipment: North America

2014 ~ 2015 Comparison

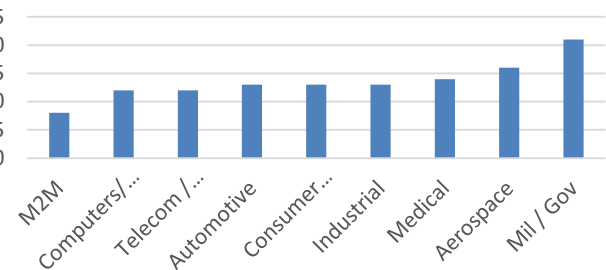
2014 Revenue Importance

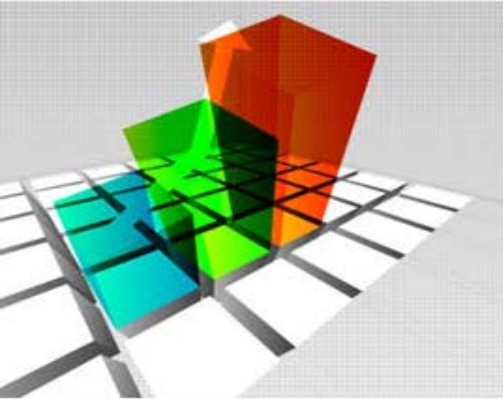
North America EMC Test Equipment Markets



2015 Revenue Importance

North America EMC Test Equipment Markets



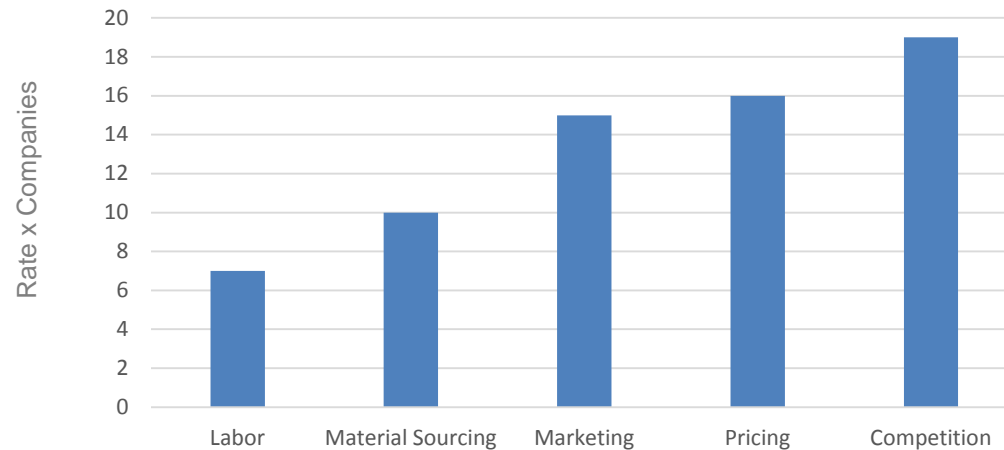


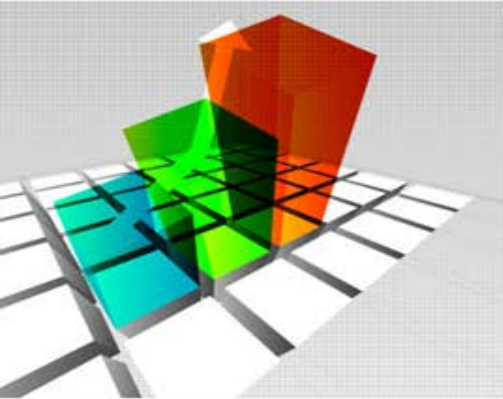
EMC Test Equipment: North America

Q4: Please rate the areas that you feel will challenge your company's growth over the next 12 months?

2015 Challenges

North America EMC Test Equipment Suppliers

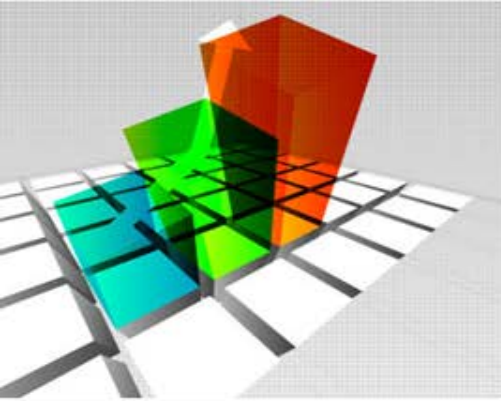




EMC Test Equipment: The Biggest Movers 2015

The Biggest Movers for 2015

1. *China / Consumer Electronics*
2. *China / Aerospace*
3. *Europe / Automotive*
4. *North America / Medical*



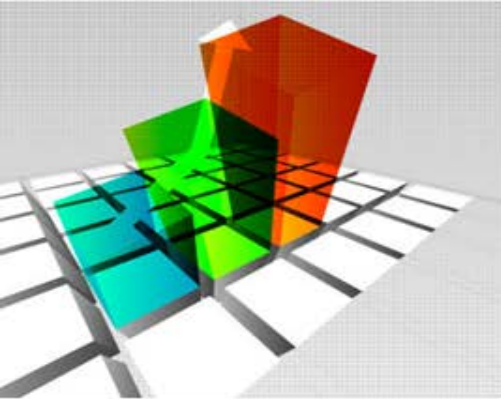
EMC Global Markets: The Biggest Challenges 2015

EMC Test Equipment:

China/Marketing

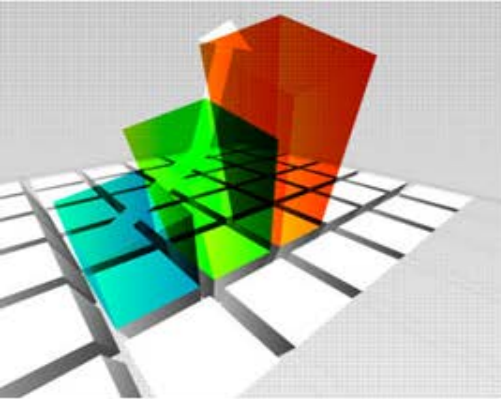
Europe/Pricing

North America/Competition



EMC Global Markets: 2015

New Marketing Solutions



2015: EMC Marketing Solutions

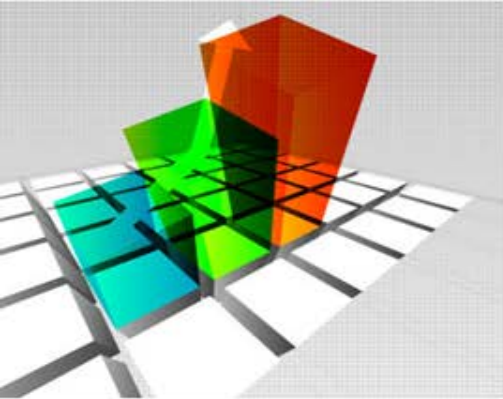
EMC LIVE 2015

April 28 ~ 30, 2015
www.emclive2015.com

EMC LIVE 2015
TEST BOOTCAMP

EMC LIVE 2015
DESIGN BOOTCAMP

interference^{TEAM}
technology



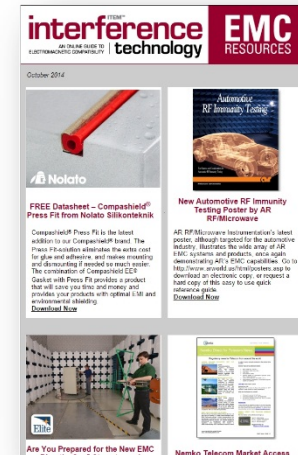
2015: EMC Marketing Solutions

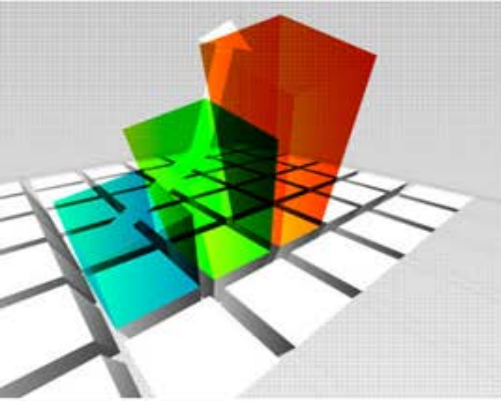
EMC Resources

Highly Targeted Leads Online / Email



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2015: EMC Marketing Solutions

Thank You

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technology