



Associazione Nazionale
Componenti Elettronici

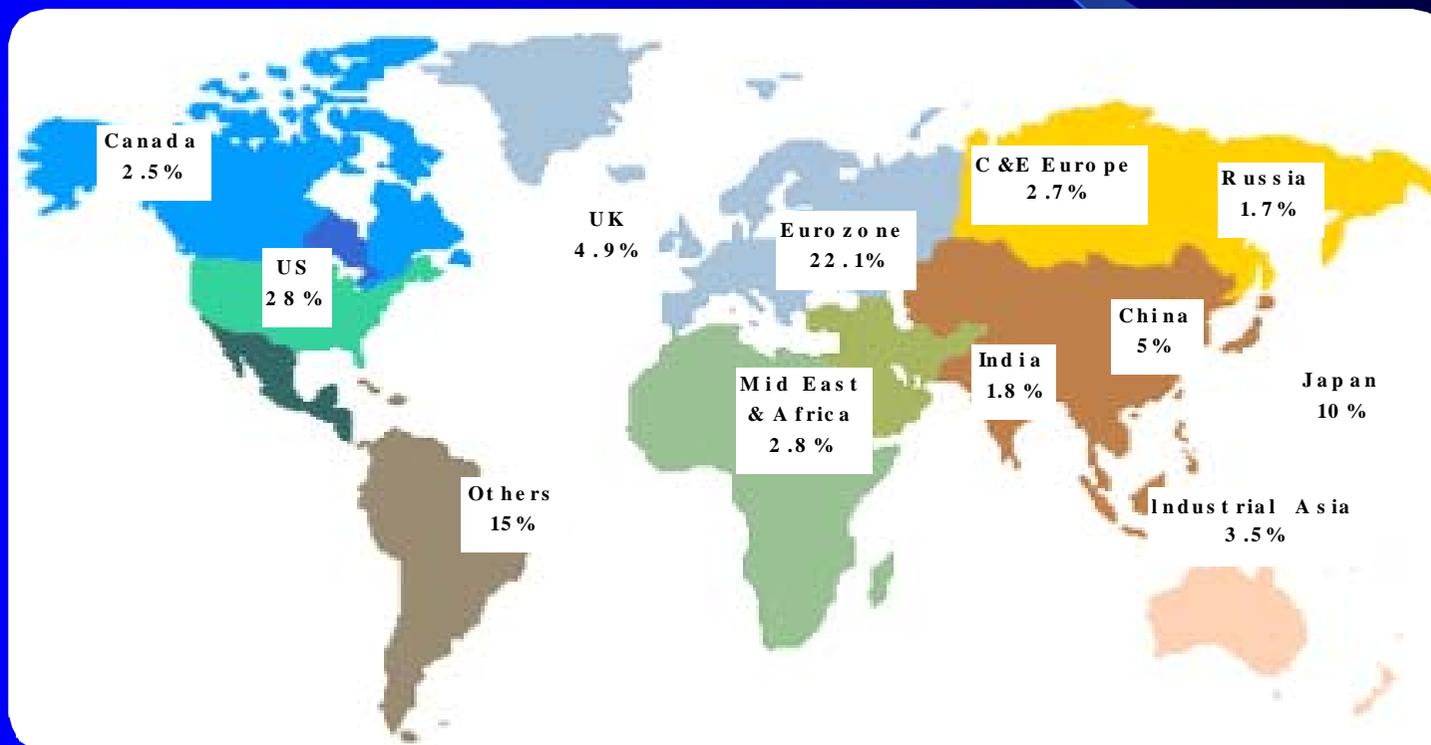


L'Italia dei componenti elettronici

Dati e commenti

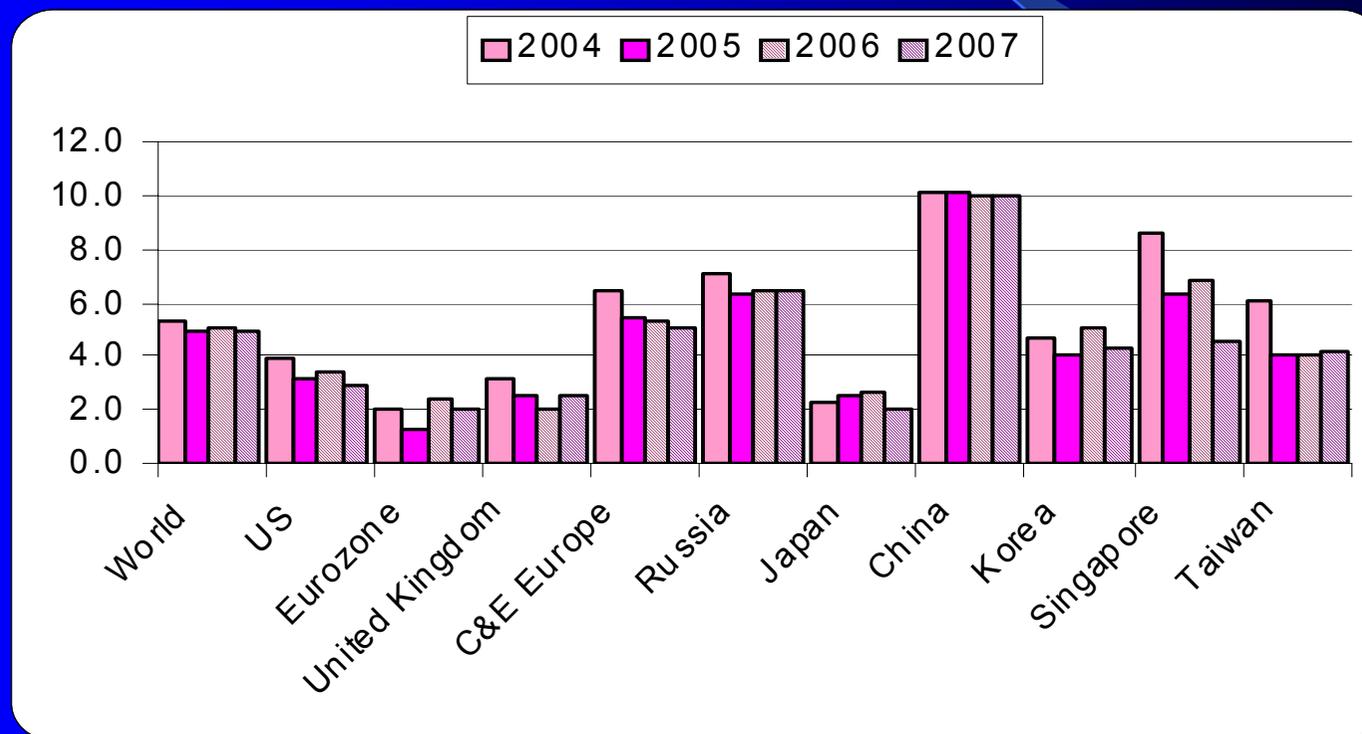
Un 2006 alla grande.. O no?

Un anno eccezionale per le economie mondiali



2006 World Output: US\$ 46,3 Trillion

Un anno eccezionale per le economie mondiali





Crescita per Paese

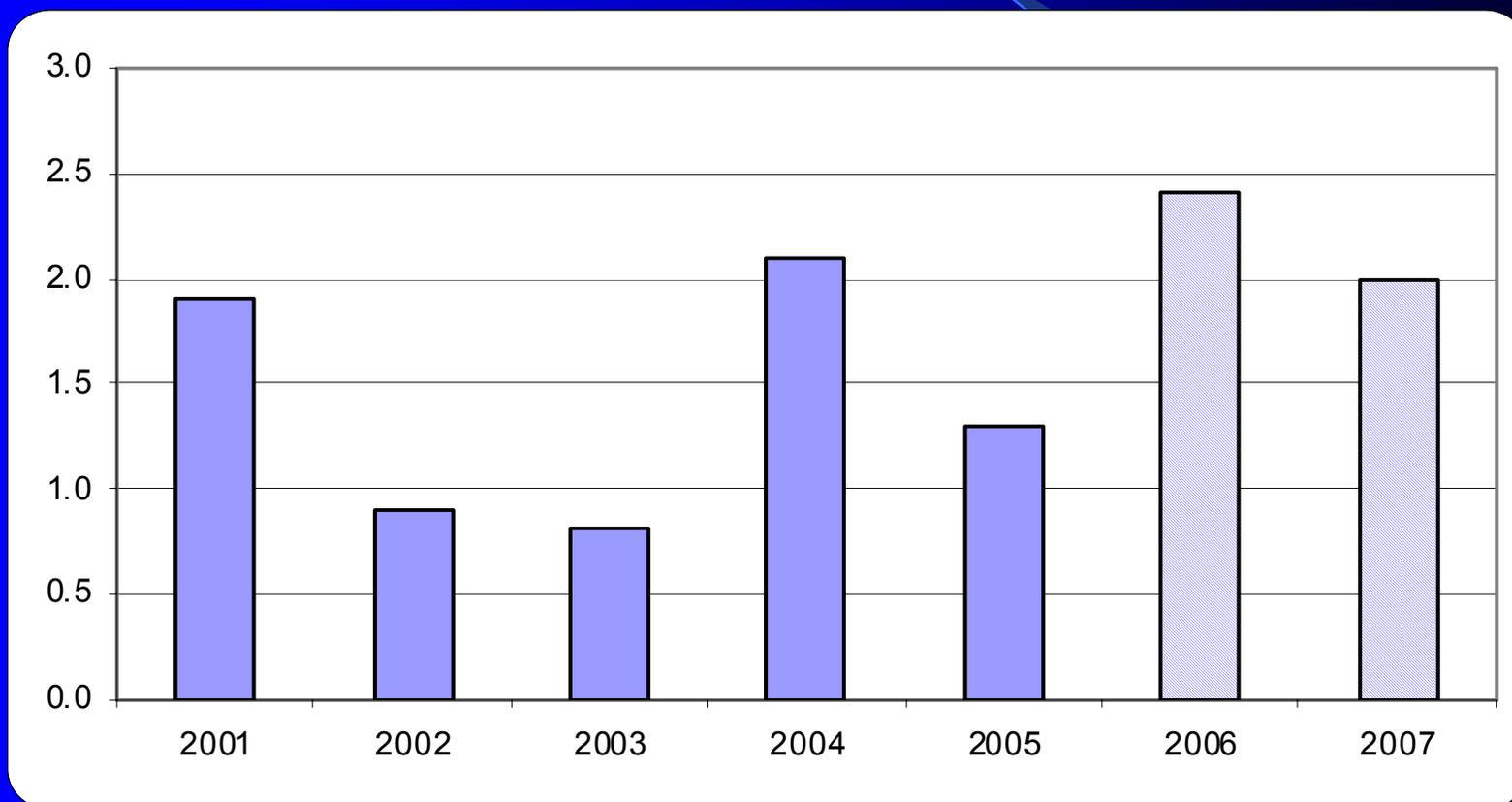
GDP Growth Rate	2004	2005	2006F	2006R	F/R Delta	2007F
US	4.2%	3.5%	2.7%	3.4%	0.7%	2.9%
Japan	2.3%	2.7%	2.0%	2.7%	0.7%	2.1%
Euro Area	2.1%	1.3%	1.8%	2.4%	0.6%	2.0%
UK	3.1%	1.8%	2.2%	2.7%	0.5%	2.6%
C&E Europe	6.5%	5.3%	4.6%	5.3%	0.7%	5.0%
CIS	8.4%	6.5%	5.7%	6.8%	1.1%	6.5%
Korea	4.6%	4.0%	5.0%	5.5%	0.5%	4.3%
Taiwan	6.1%	4.1%	4.3%	4.5%	0.2%	4.2%
Singapore	8.7%	6.4%	4.5%	5.5%	1.0%	4.5%
China	10.1%	9.9%	8.2%	10.0%	1.8%	10.0%
India	8.1%	8.3%	6.3%	8.3%	2.0%	7.3%
Brazil	4.9%	2.3%	3.5%	3.6%	0.1%	4.0%
World	5.3%	4.8%	4.3%	5.1%	0.8%	4.9%



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Cresce anche l'Eurozona





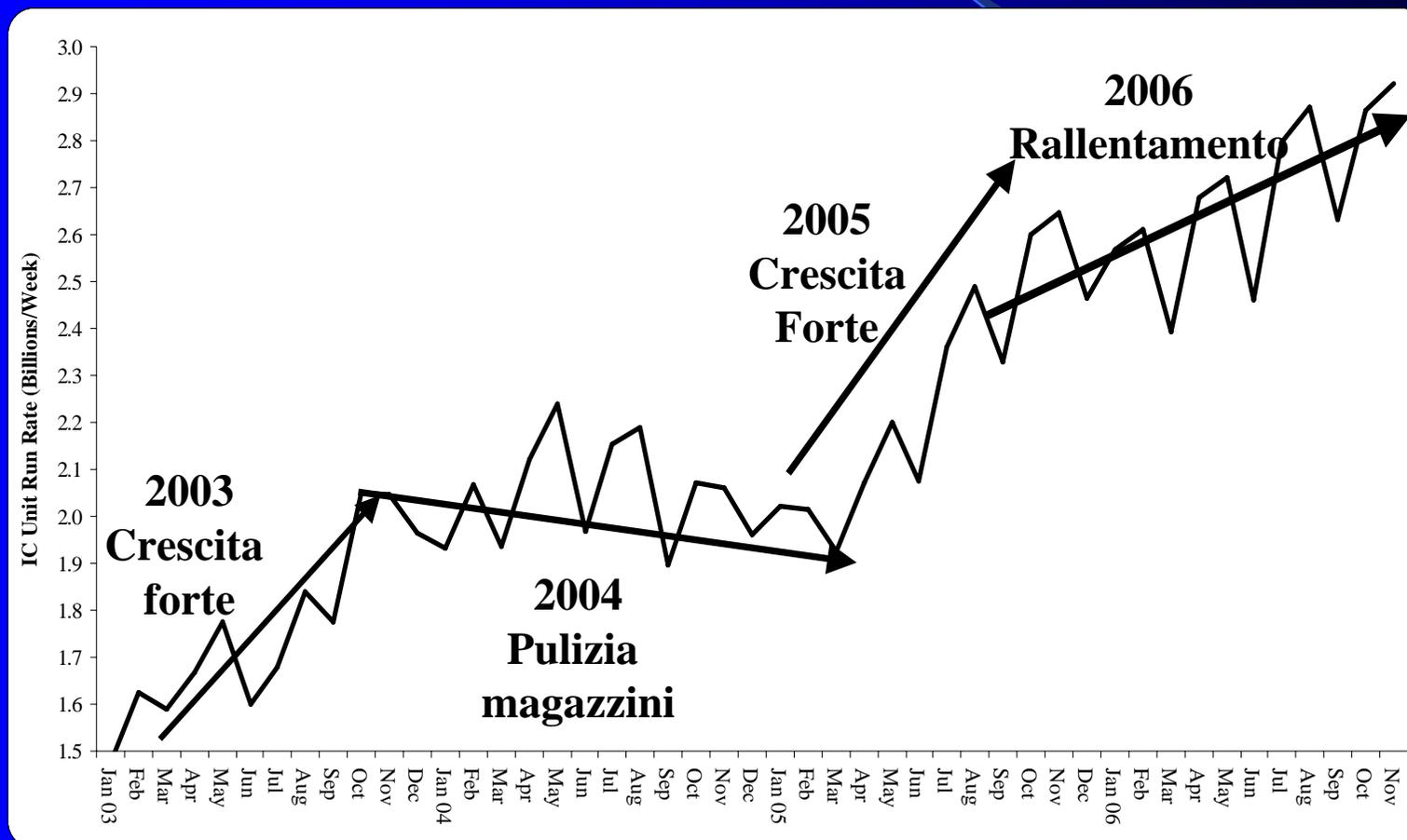
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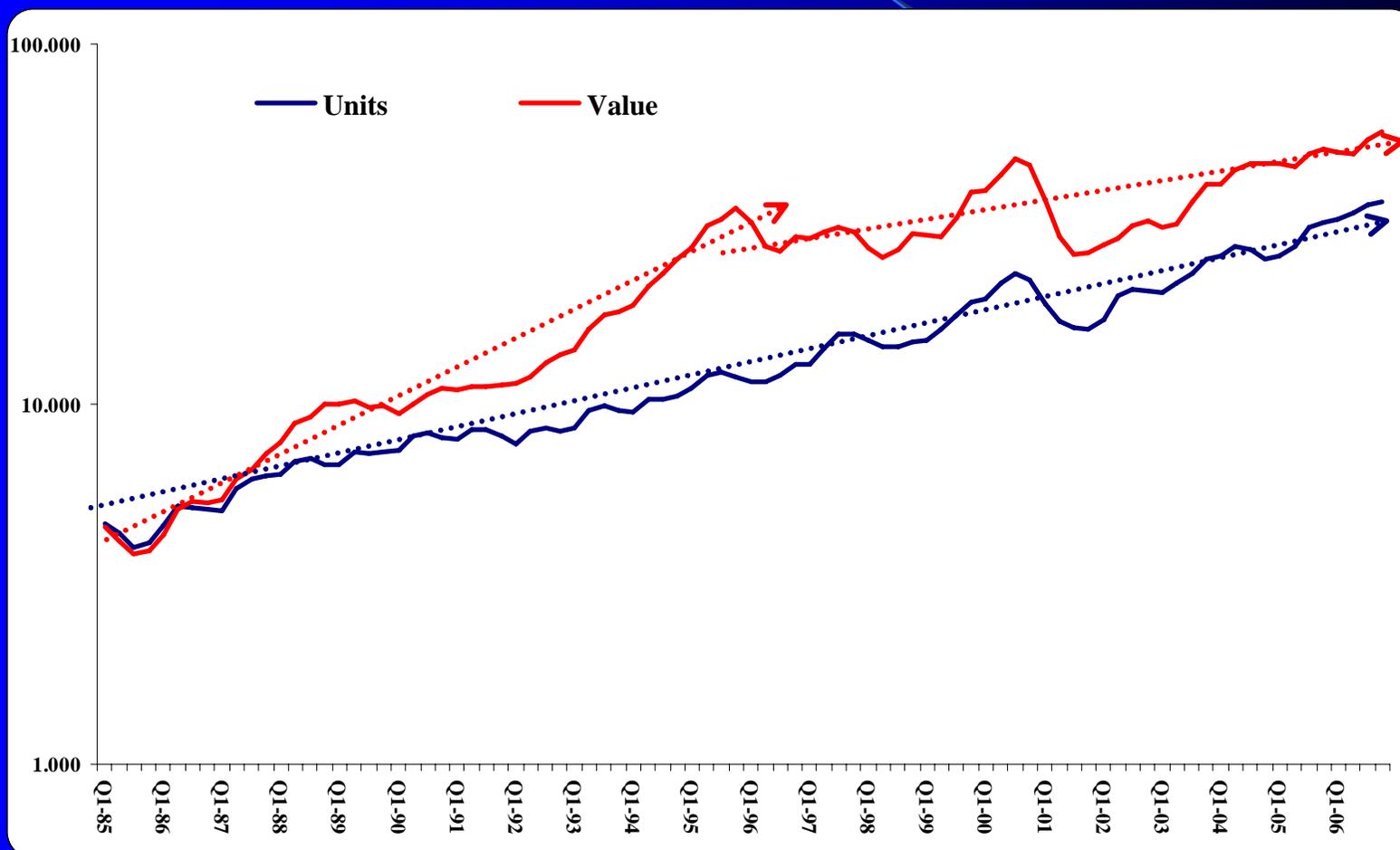
E i semiconduttori...

<i>World</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>	<i>YTD</i>	<i>Growth</i>
MARKET - \$M	2003	2004	2005	2006	06/05
Semiconductor	166.426	213.027	227.484	247.716	8,9%
Differentiated ICs	70.987	92.427	100.493	107.772	7,2%

Crescono i volumi



Nel lungo periodo...

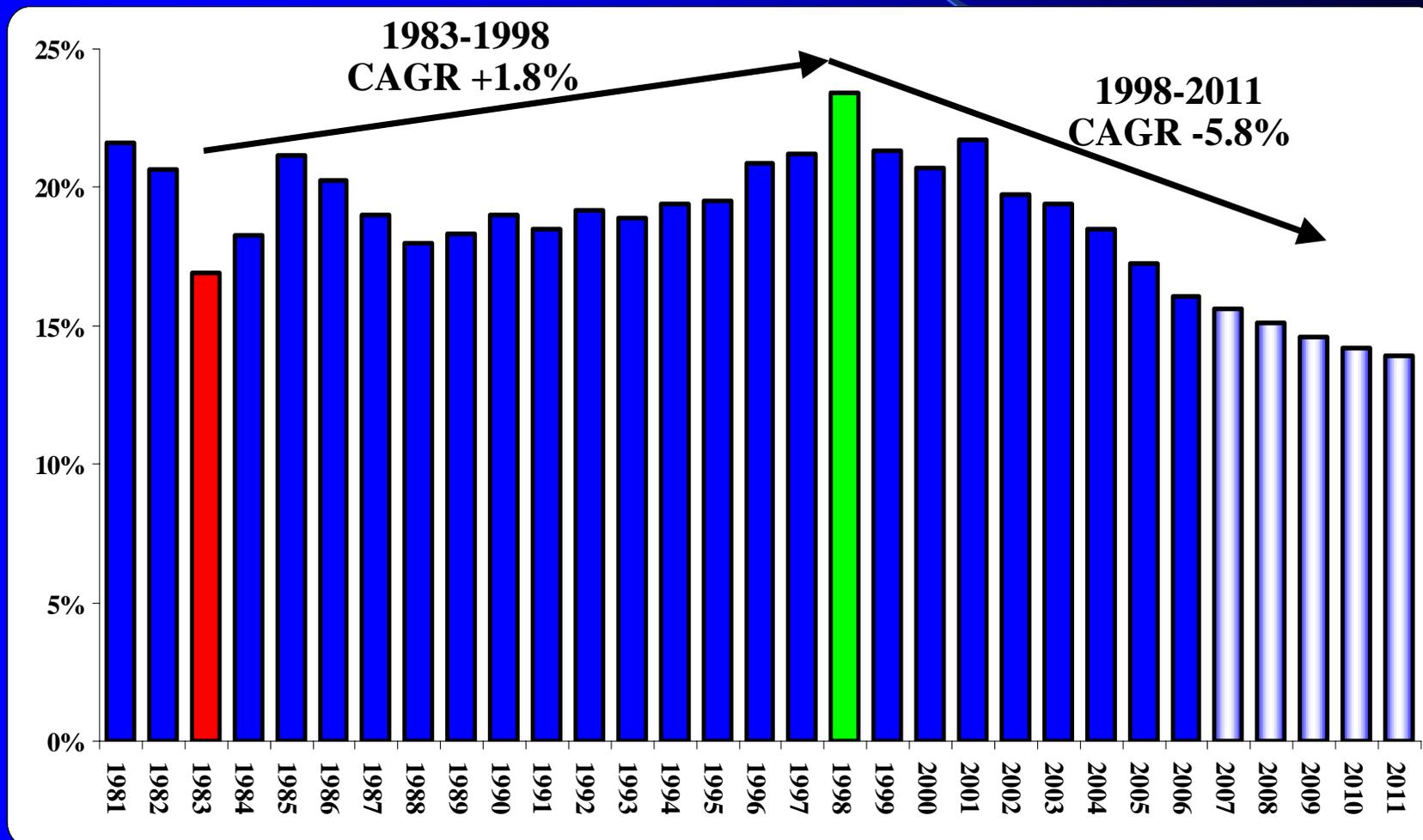




L'Europa dei chip

<i>EUROPE</i>	<i>Y</i>	<i>Y</i>	<i>Y</i>	<i>YTD</i>	<i>Growth</i>
MARKET - \$M	2003	2004	2005	2006	06/05
Semiconductor	32.310	39.424	39.275	39.904	1,6%
Differentiated ICs	13.039	16.103	15.953	16.539	3,7%

L'Europa dei chip...





Il mercato italiano dei semiconduttori nel 2006

- Fatturato ANIE: 895 M€
 - Fatturato dichiarato dal club moltiplicato per il fattore di copertura
 - Di cui OEM → 484 M€
- Fatturato Assodel: 864 M€
 - Fatturato dichiarato dal panel moltiplicato per il fattore di copertura (senza LCD)
- Totale Italia: 1348 M€

Andamento del mercato

- Rispetto al trimestre precedente
+6,95%
- Rispetto allo stesso trimestre 2005
+8,84%
- Crescita totale 2006 rispetto al 2005
+6,24%



Il mercato italiano dei semiconduttori

	4q06			Totale 2006		
	OEM	ASSO	TOT	OEM	ASSO	TOT
Total Discrete	18977	31135	50112	78308	139099	217408
Total Opto	4836	18075	22910	21425	82293	103718
Total Std. Linear	17102	37819	54921	61446	168020	229466
Total MOS Logic	31907	31285	63192	126912	135811	262723
Total MCU	25388	56968	82355	105052	242710	347762
Total Memories	20656	23382	44038	91048	96010	187058
Totale	118866	198663	317529	484190	863944	1348135

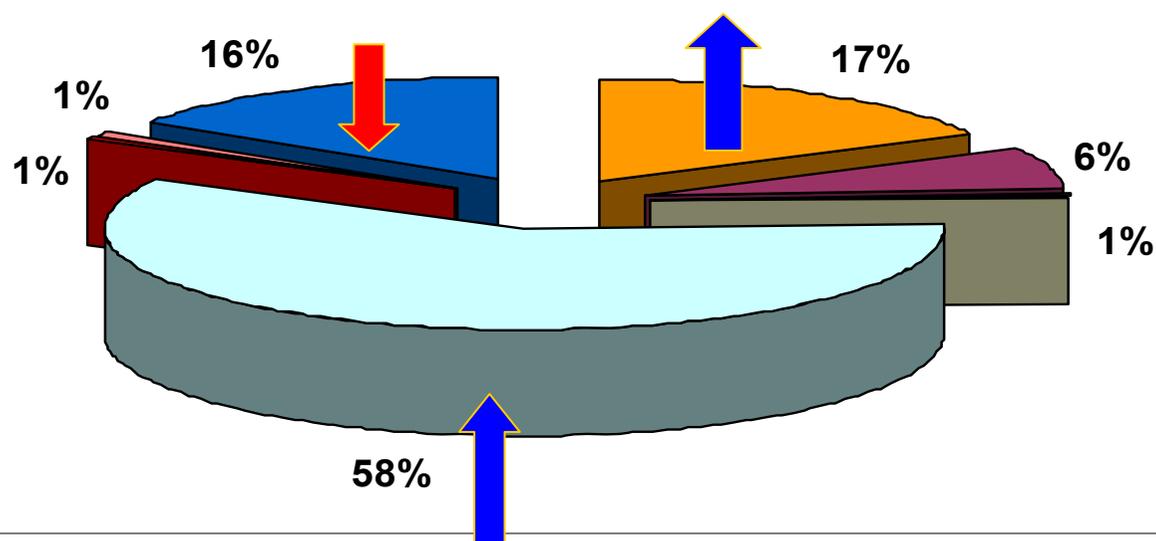
La distribuzione rappresenta il 64% del totale



Percentuali di crescita

Totale			
	YTD%	PQ	PY
Total Discrete	6,05%	-1,23%	2,45%
Total Opto	8,81%	-5,63%	2,67%
Total Std. Linear	24,36%	1,91%	30,15%
Total MOS Logic	19,39%	3,91%	13,53%
Total MCU	-8,40%	24,48%	-4,62%
Total Memories	1,41%	7,39%	21,25%
Totale	6,24%	6,95%	8,84%

I mercati finali



- Automotive
- Consumer
- Data Processing
- Industrial
- Military
- Smart Card
- Telecommunication



Il panel (Assodel)

- Abacus/ECC
- Adelco
- Ades
- Adveco
- Arrow/Silverstar
- Avnet Group
- Cefra
- Comprel
- Consortium
- Distar
- EII
- Elettromeccanica
- Esco Italiana
- Future
- Kevin Schurter
- Melchioni
- SGE Syscom
- Special Ind
- TTI
- Welt



Il Panel (Anie)

- ATMEL
- FREESCALE
- FUJITSU
- NEC
- MICRON
- MITSUBISHI
- NXP (PHILIPS)
- RENESAS
- SAMSUNG
- ST MICROELECTRONICS
- TOSHIBA
- VISHAY

Alcune note

- I dati riportati nel seguito sono i risultati diretti delle rilevazioni ottenute tramite i due panel (senza tenere conto del fattore di copertura)
- Alcune famiglie di componenti sono classificate in modo lievemente diverso dalle due associazioni



Semiconductors & FPDs (Assodel)

	YTD05	YTD06	Δ%
Discretes	121.956	122.711	0,62%
Opto	70.865	75.710	6,84%
Analog	128.915	154.579	19,91%
Bip & Mos	87.966	124.947	42,04%
Memory	96.176	88.329	-8,16%
Micro	249.777	223.293	-10,60%
LCD Disp.	32.310	46.807	44,87%
Sensors	6.137	5.291	-13,79%
Totale	794.103	841.667	5,99%



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Semiconductors & FPDs (Assodel)

Al netto
dell'effetto PC...

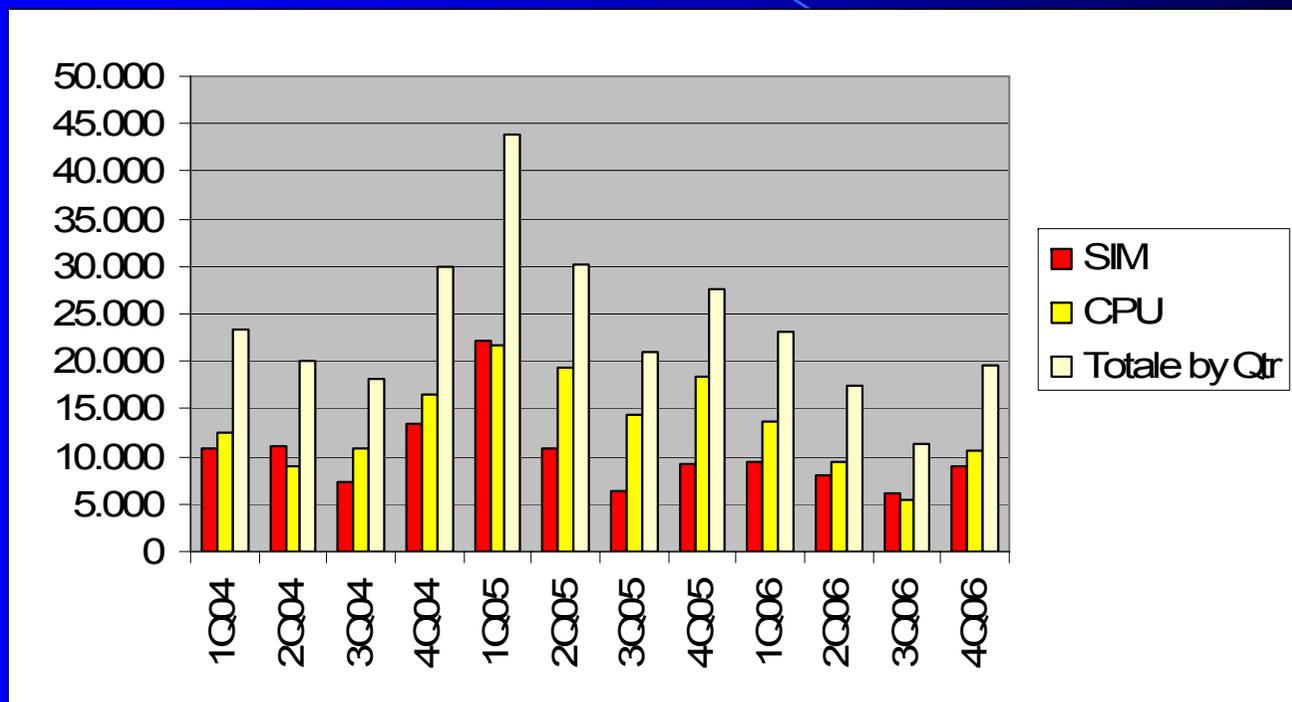


Semiconductors & FPDs

Industrial only

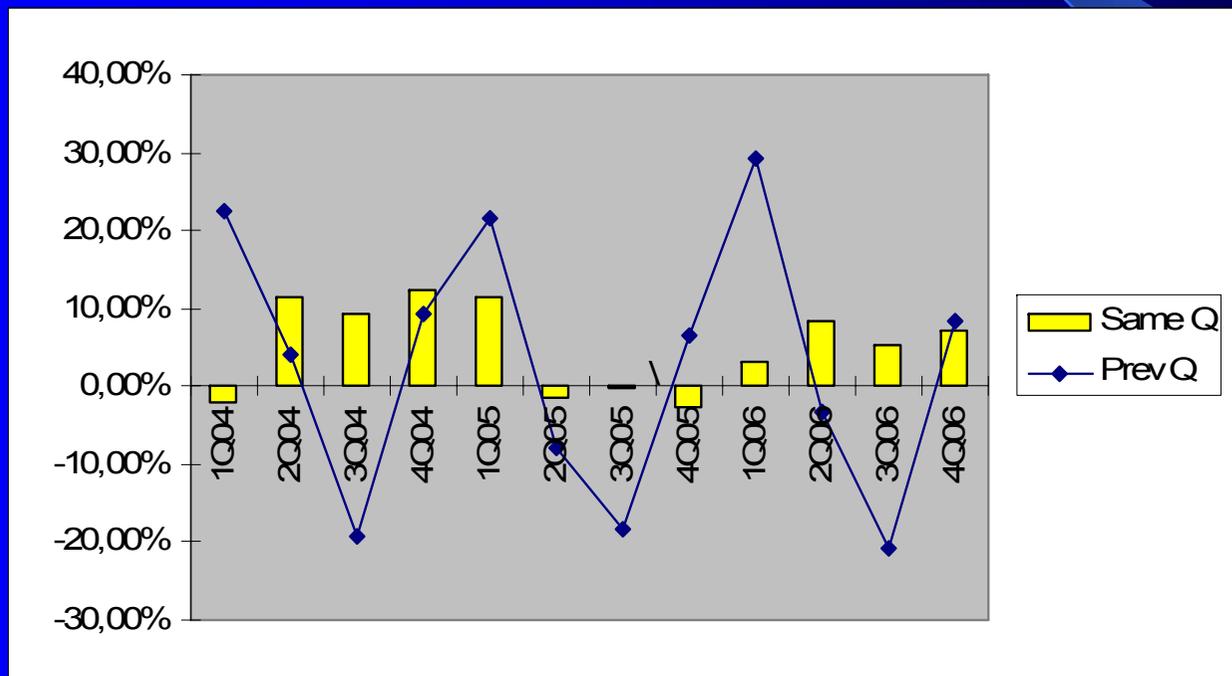
Products (NO PC)	Same Q	Prev Q	Prev Q
Discretes	-6%	-1%	1%
Opto	-4%	-1%	7%
Analog	15%	4%	20%
Bip & Mbs	40%	-2%	42%
Memory	24%	-5%	18%
Micro	7%	5%	5%
LCD Displays	83%	54%	45%
Sensors	-24%	34%	-14%
Total	14%	4%	15%

Semiconductors: PC

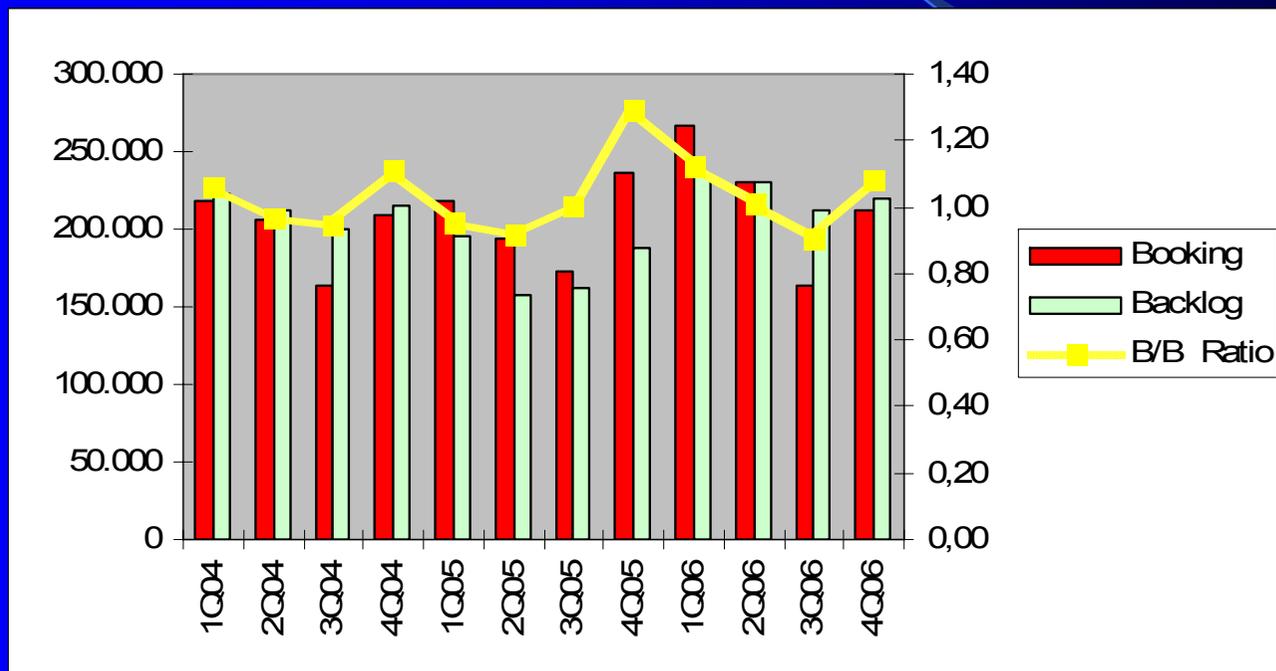


The PC	1Q06	2Q06	3Q06	4Q06
SIM	9.403	7.949	6.030	8.923
CPU	13.648	9.454	5.387	10.707
Totale by Qtr	23.050	17.403	11.417	19.630
Qtr/Qtr %	-16,53%	-24,50%	-34,40%	71,93%
Yr/Yr %	-47,38%	-42,42%	-45,44%	-28,91%

Semiconductors & FPDs

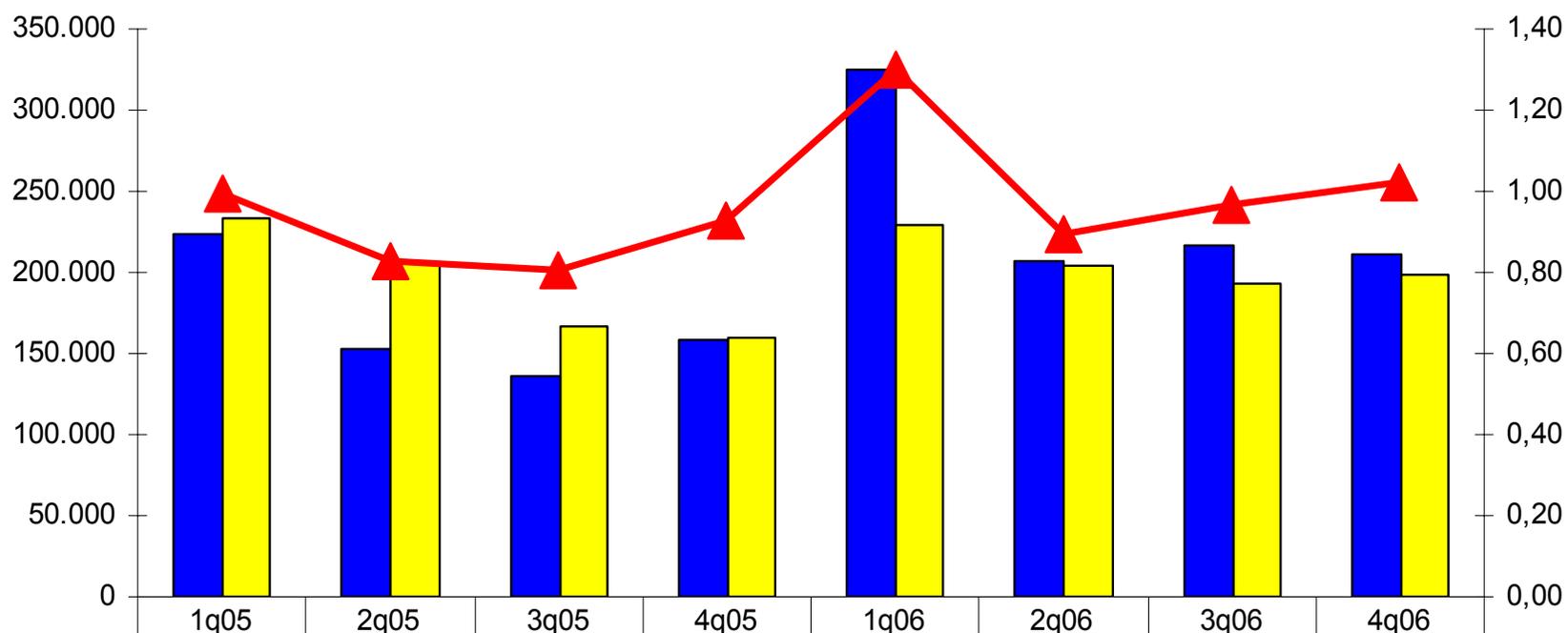


Semiconductors & FPDs (Assodel)

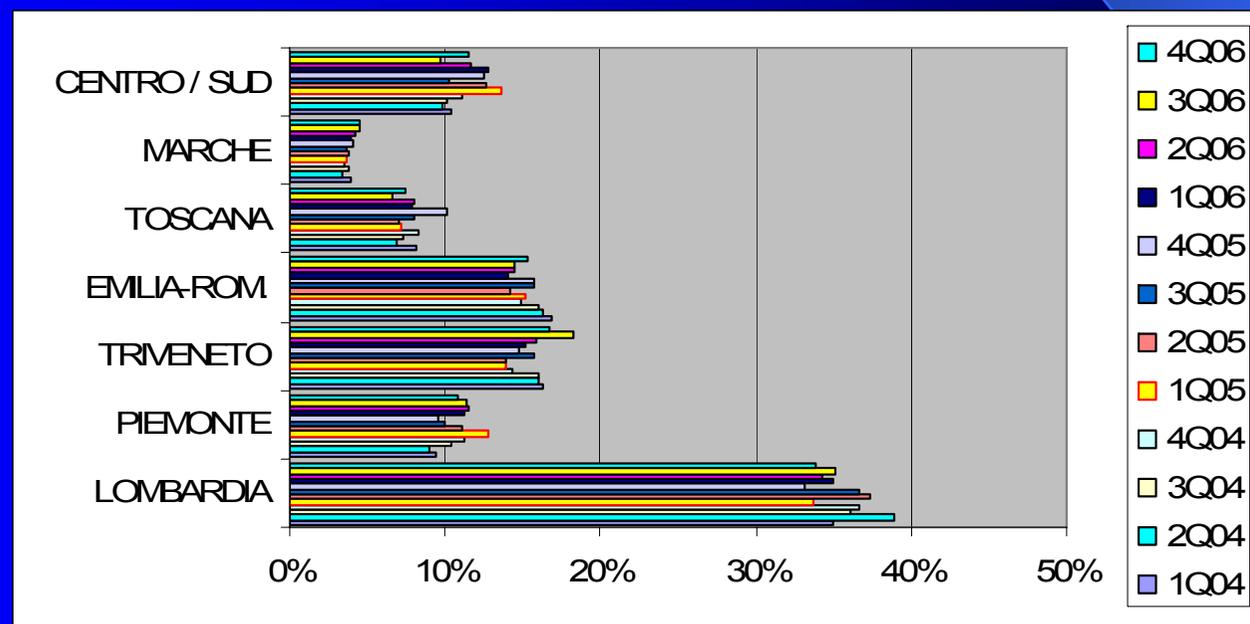


	1Q06	2Q06	3Q06	4Q06
Booking	266.073	230.583	164.384	212.039
Backlog	235.484	230.212	211.684	220.134
B/B Ratio	1,13	1,01	0,91	1,08

Book to bill (ANIE)



Semiconductors & FPDs by region (Assodel)



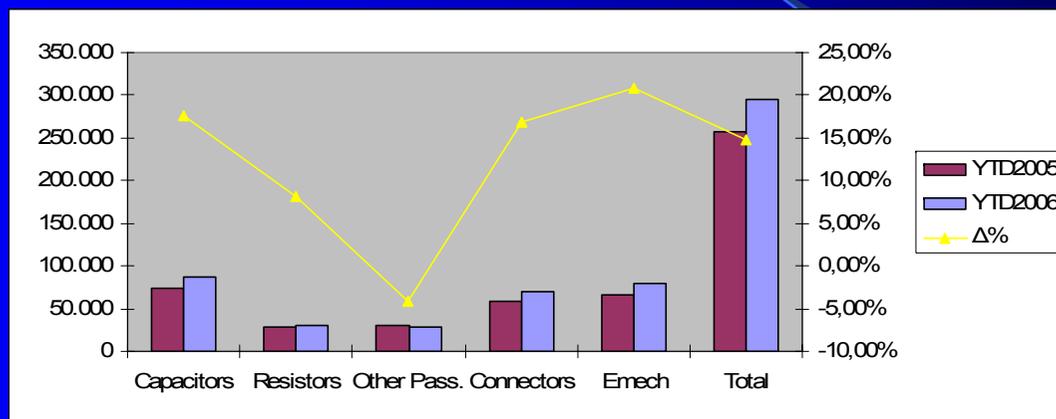


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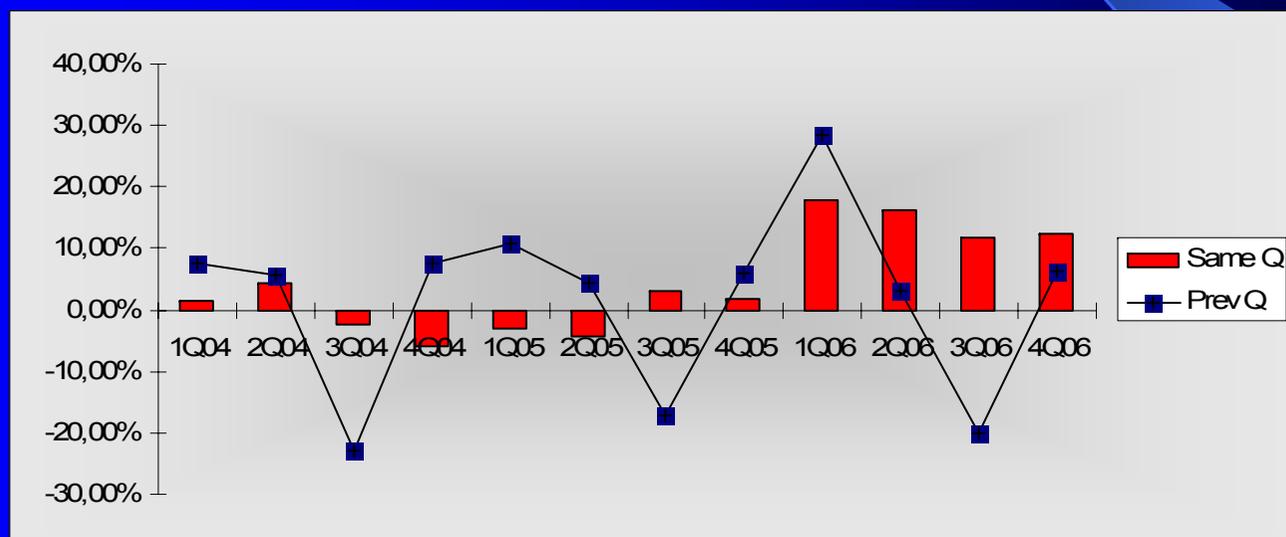
IP&E

IP&E

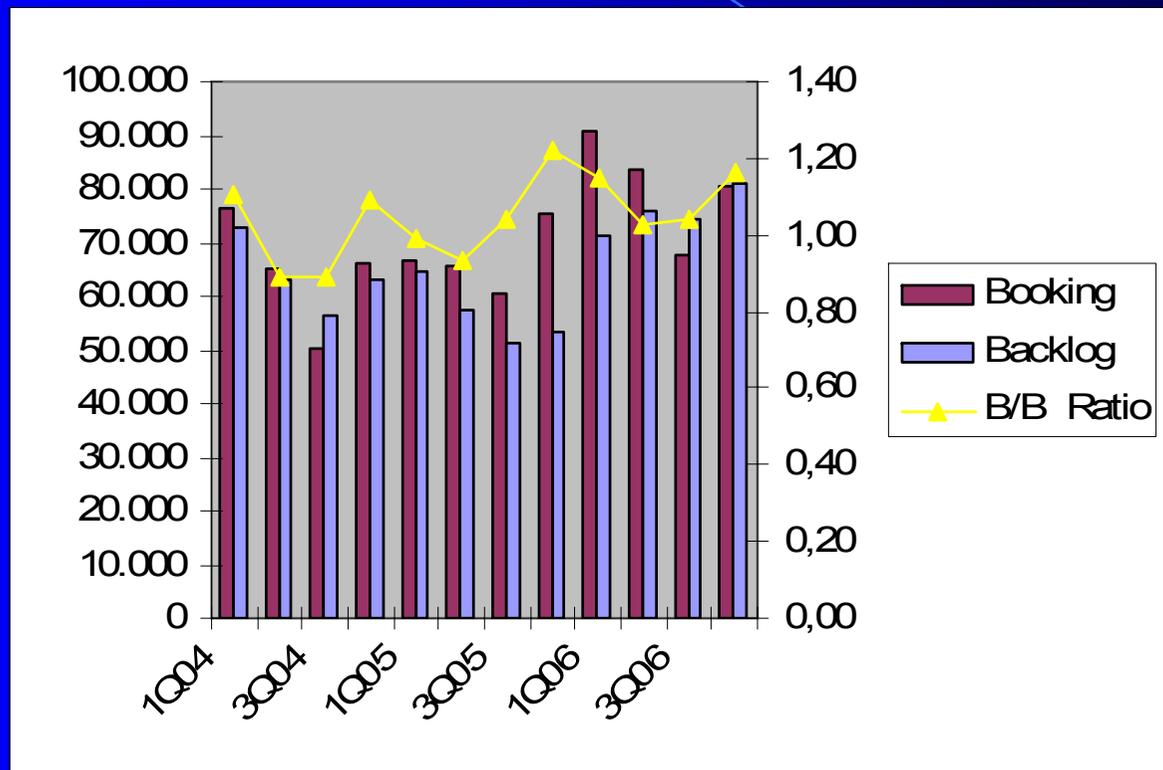


IP&E	YTD2005	YTD2006	Δ%
Capacitors	73.459	86.467	17,71%
Resistors	28.188	30.479	8,13%
Other Pass.	29.472	28.273	-4,07%
Connectors	59.326	69.376	16,94%
Emech	66.573	80.395	20,76%
Total	257.016	294.990	14,77%

IP&E



IP&E



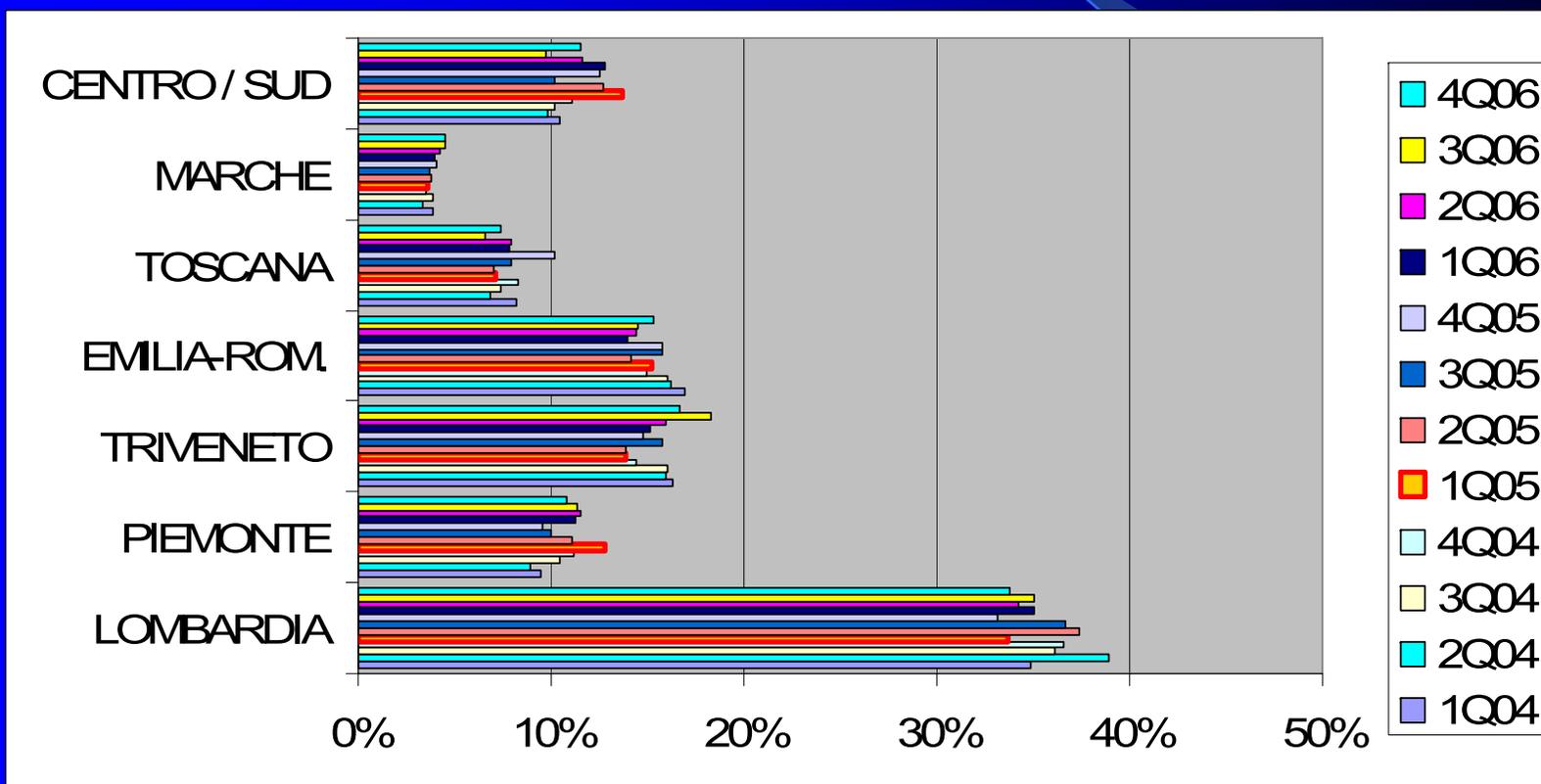
	1Q06	2Q06	3Q06	4Q06
Booking	90.780	83.548	67.656	80.706
Backlog	71.032	76.012	74.363	81.010
B/B Ratio	1,15	1,02	1,04	1,17



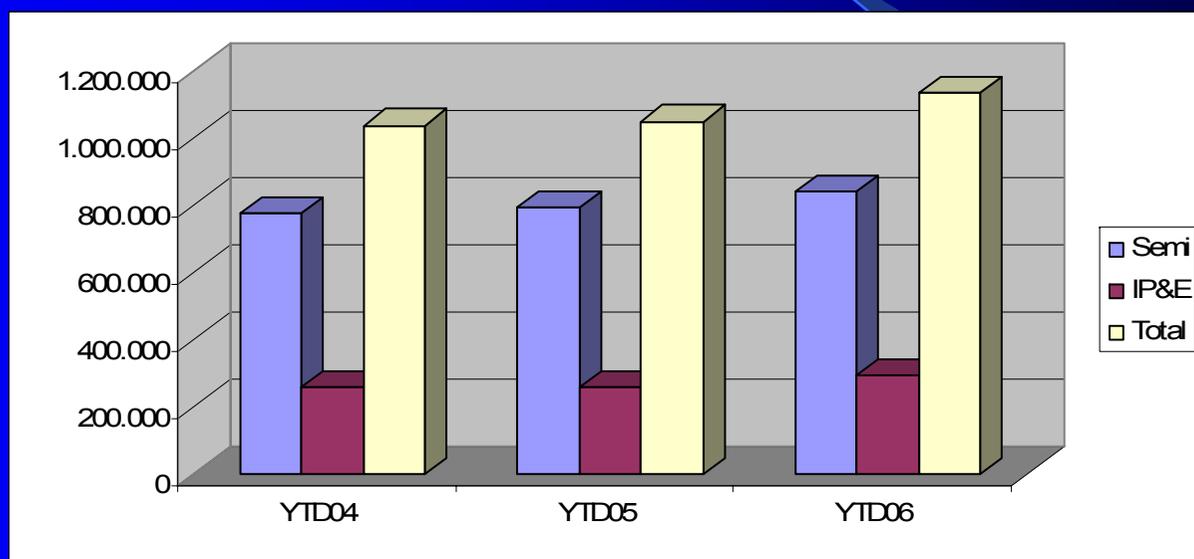
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IP&E



Totale DTAM



	YTD04	YTD05	YTD06
Semi	779.189	794.103	841.637
IP&E	259.734	257.016	294.990
Total	1.038.923	1.051.119	1.136.626
Δ%		1,17%	8,13%