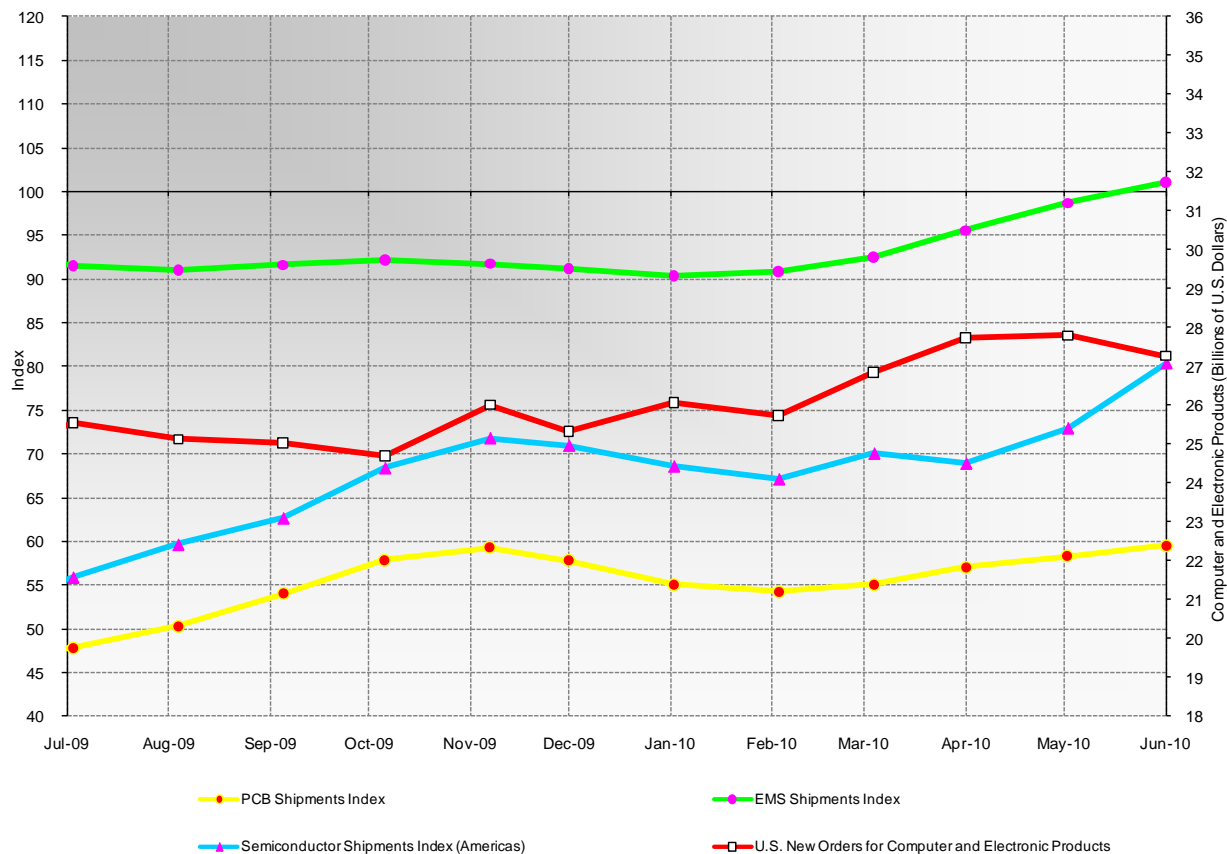


## Trends in U.S. Computer and Electronic Products New Orders and North American Sales Indices of Selected Supplier Industries Jul 2009 – Jun 2010

The following information is provided by IPC — Association Connecting Electronics Industries® from its quarterly business report, the *Market Data Update*. Other industry data can be found at [www.ipc.org](http://www.ipc.org).



Note on the graph: All indices are based on the same baseline of the average month in 2000=100, and reflect a 3-month rolling average.

Sources: IPC statistical programs for the EMS and PCB industries; SIA for semiconductor data; U.S. Census Bureau for U.S. new orders for computer and electronic products.

### Recovery Continues in North American Electronics Supply Chain

Sales results for the Electronics Manufacturing Services (EMS) industry for the past four months show that the industry is finally rebounding after spending the preceding eight months at the bottom of the downturn. In June 2010, the industry once again surpassed its year-2000 average in sales (the baseline for the index in the graph above).

Semiconductor shipments and printed circuit board (PCB) shipments also grew in June. U.S. new orders for computer and electronic products declined in June after an uptick in the preceding three months.

Several leading indicators support the view that the electronics industry is well on the road to recovery. IPC's PCB book-to-bill ratio has been above parity (1.0) since May 2009. It stands at 1.12 as of June 2010. The book-to-bill ratio leads sales in the PCB industry by an average of three to six months. The current trend is a very encouraging sign of expected growth in North American PCB sales in 2010.