

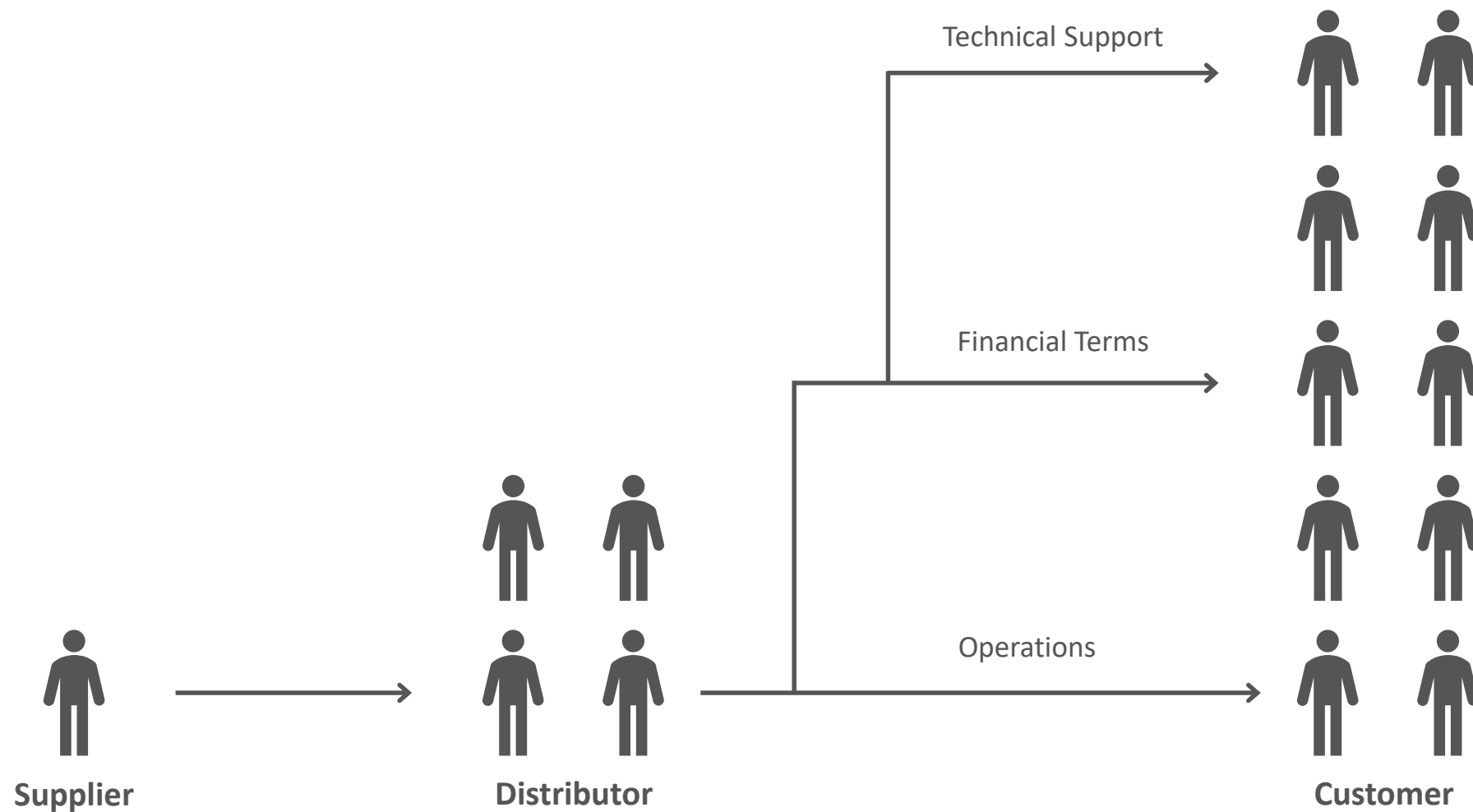


# 中国经销领域的变化

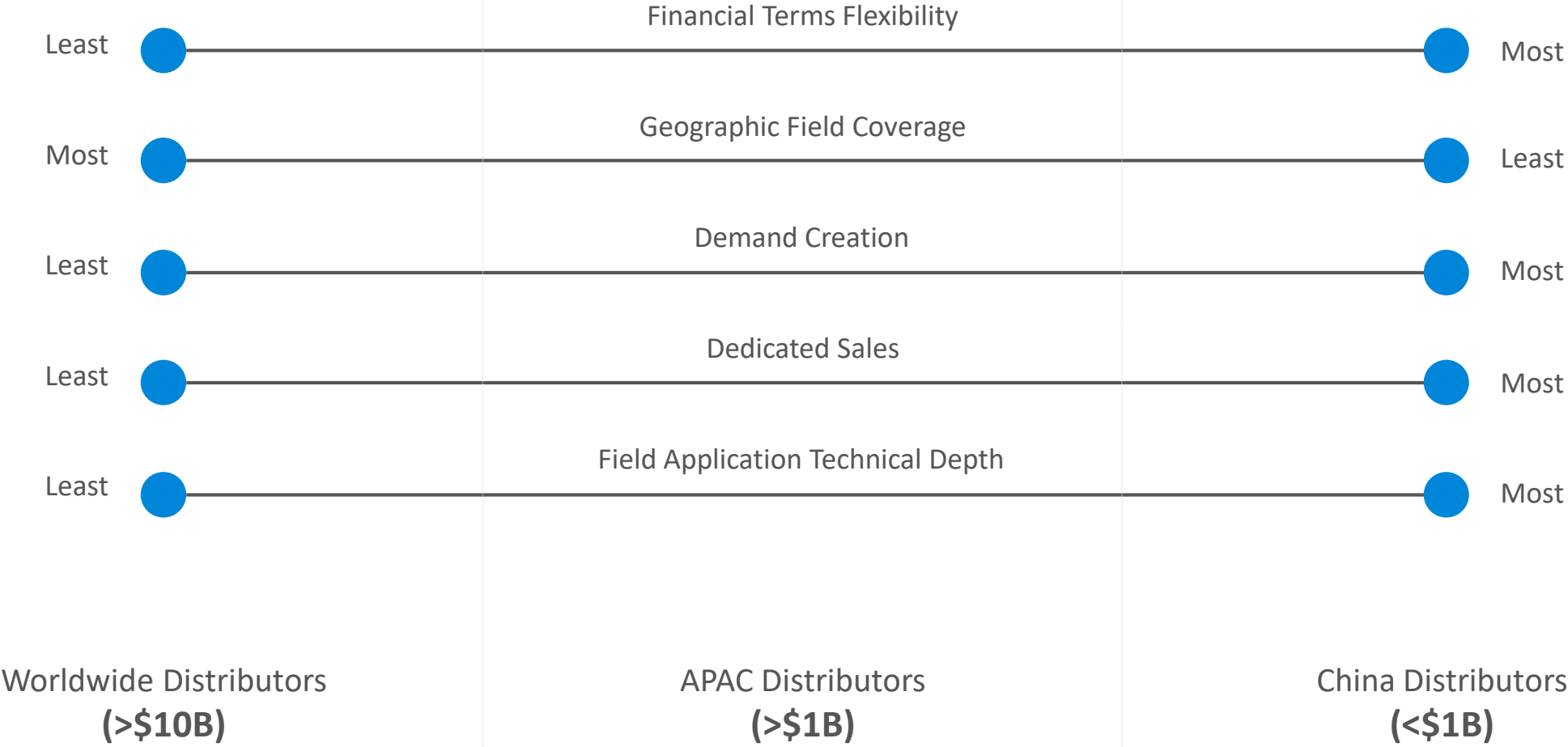
JOHN DIXON, VICE PRESIDENT, GLOBAL DISTRIBUTION | NOVEMBER 2018



# 经销商的角色



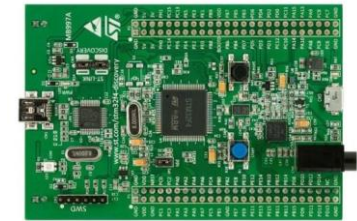
# 传统的经销网络 – 各领域实况



# 传统的经销网络 - 线上

	Global Online Distributors	APAC Online Distributors	Other (TaoBao, Alibaba etc)
Shipping Costs	High	Low	Low
Silicon Costs	Market	Market	Low
Shipping Time	Long	Short	Short
Field Sales	Low	High	None
Technical Support	Low	High	None

# 其他因素

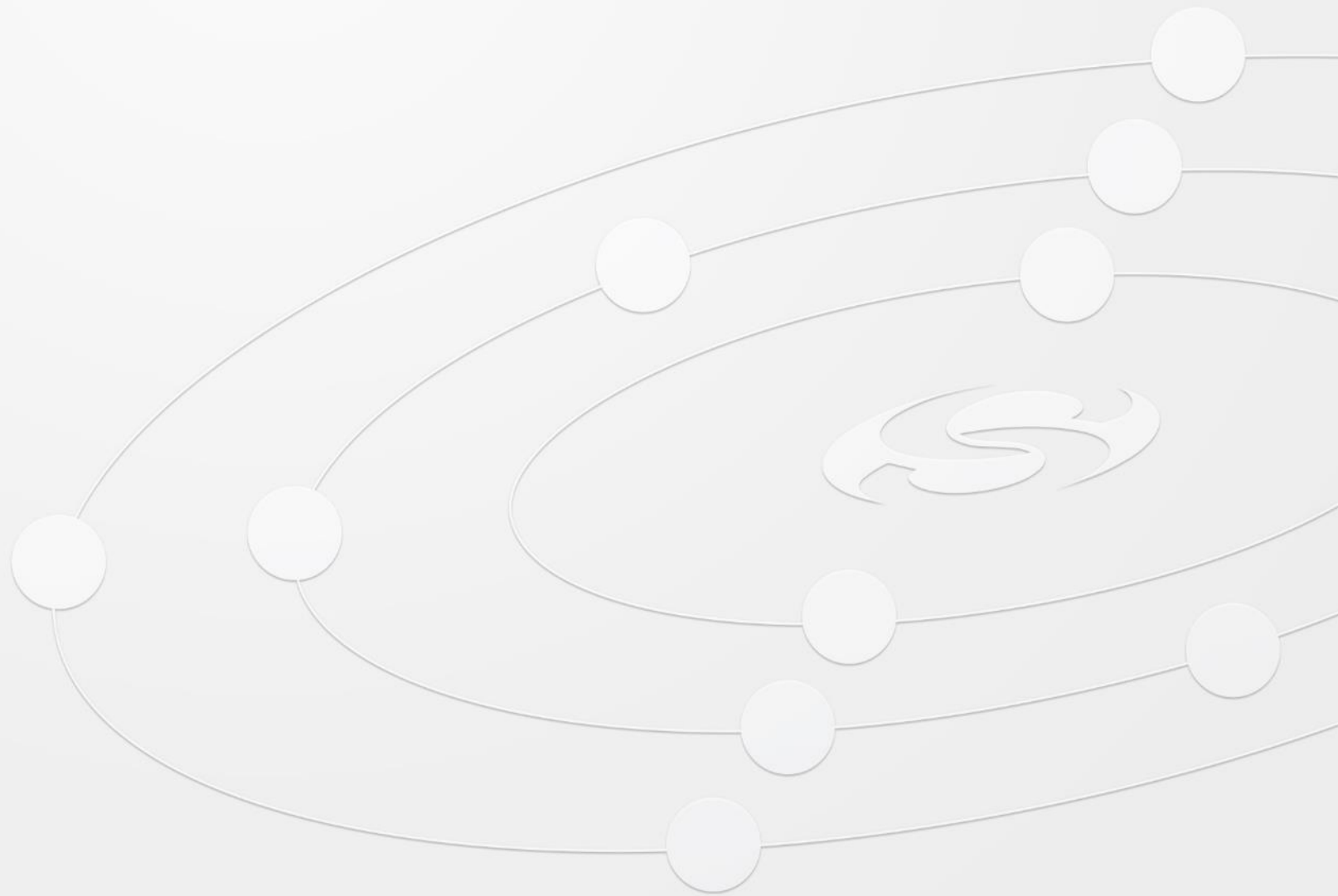


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# 市场趋势



# 经销获利空间的压力



## 获利率压力增加

- 供应商要求提升全球经销商的利润，给中国经销商带来更多压力
- 为达到规模经济，供应商正在整合而压缩了经销的获利空间

Silicon Labs    Broadcom    Cypress Semi    Nvidia    Taiwan Semi    Analog Devices    Intel    Microchip    Samsung    Texas Instruments    On Semi    NXP    AMD



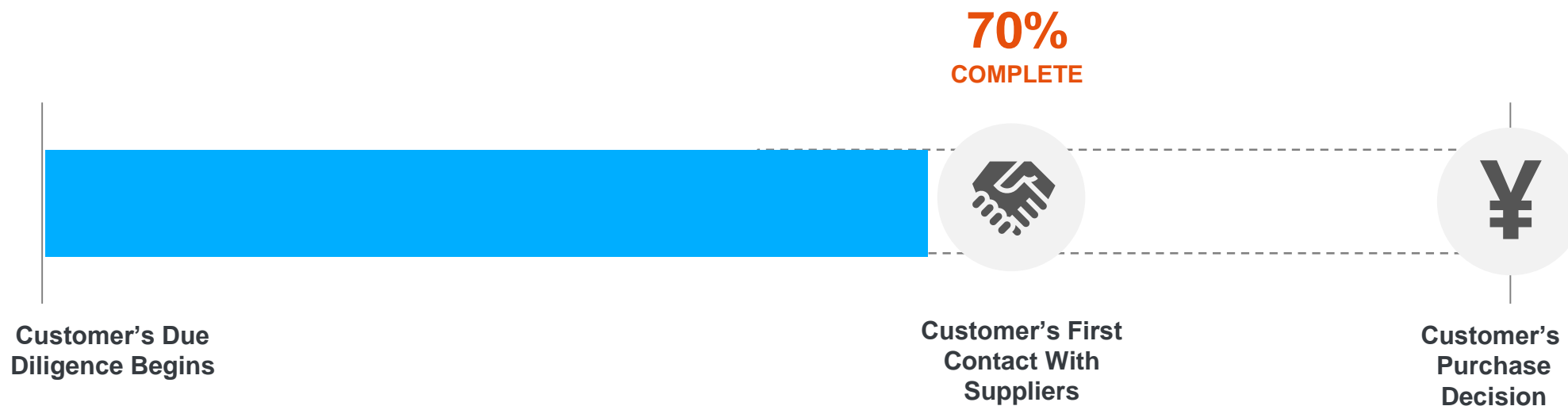
# 经销领域销售的稀释



- 随着传统经销商需要销售线和支持的增加，稀释了销售和技术支持的资源
- 供应商看到经销网络可创造的需求递减，因而转为仅履约保证模式



# 非传统线上市场的蓬勃发展

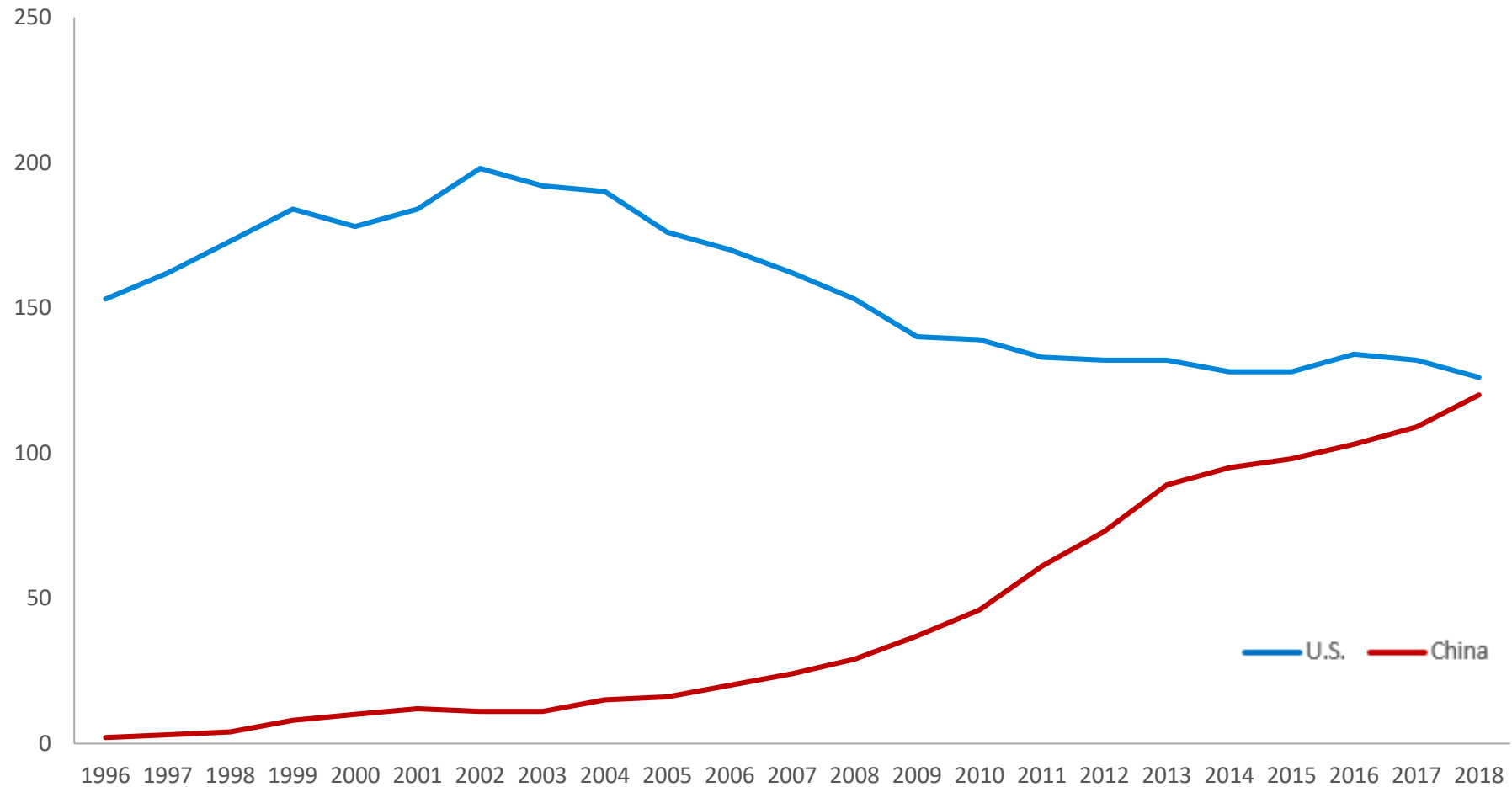


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# 中国经济在全球的扩展







Fortune Global 500 Companies: 1996-2018



# 成立70亿美元的投资基金用于开发中国IC市场

	Description	Deal size \$ MM	Key Institutions
	<b>Jun'14</b> ▪ PDSTI <sup>1</sup> , a <b>Shanghai</b> government investment group <b>privatized Montage Tech</b> , a fabless analog chip maker	\$ 693	▪ Shanghai Gov. ▪ CEC
	<b>Aug'14</b> ▪ <b>Omnivision</b> , a leading CMOS imaging provider, was acquired by Chinese <b>government-backed Hua Capital</b> and <b>CITIC Capital</b>	\$1,900	▪ Beijing Gov ▪ CITIC Capital
	<b>Dec'14</b> ▪ <b>JCET</b> , <b>SMIC</b> , and <b>National IC Fund</b> formed an investment consortium ( <b>JCET \$ 260 mm</b> , <b>SMIC \$ 100 mm</b> , <b>National IC Fund \$ 300 mm</b> , <b>Bank of China loan \$ 120 mm</b> ) to acquire <b>STATS chipPAC</b>	\$ 780	▪ CICF
	<b>Jan'15</b> ▪ A Chinese investment consortium led by <b>SummitView Capital</b> and <b>Hua Capital</b> acquired <b>ISSI</b> , a memory fabless	\$ 640	▪ SummitView Capital ▪ Hua Capital
	<b>Jun'15</b> ▪ <b>JAC Capital</b> , a subsidiary of China Jianyin Investment (a large financial SOE), acquired the <b>RF Power BU</b> of <b>NXP</b>	\$ 1,800	▪ JAC Capital
	<b>Feb'17</b> ▪ <b>JAC Capital</b> acquired <b>NXP standard product BU</b> for <b>\$ 2.8 bn</b>	\$ 2,800	▪ JAC Capital
	<b>Apr'17</b> ▪ <b>Shanghai Capital</b> acquired <b>Analogix Semiconductor</b> to accelerate growth in E2E interface connectivity solutions. <b>China IC Industry Investment Fund</b> as one of the limited partners for <b>Shanghai Capital</b>	\$ 500	▪ Shanghai capital, China IC Industry Investment Fund

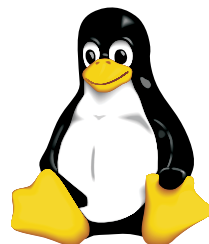
# 技术趋势 - 线上搜索

20,000+ MCU Part #'s	
	1,000+
	2,000+
	3,000+
	3,000+
	3,000+
	8,000+

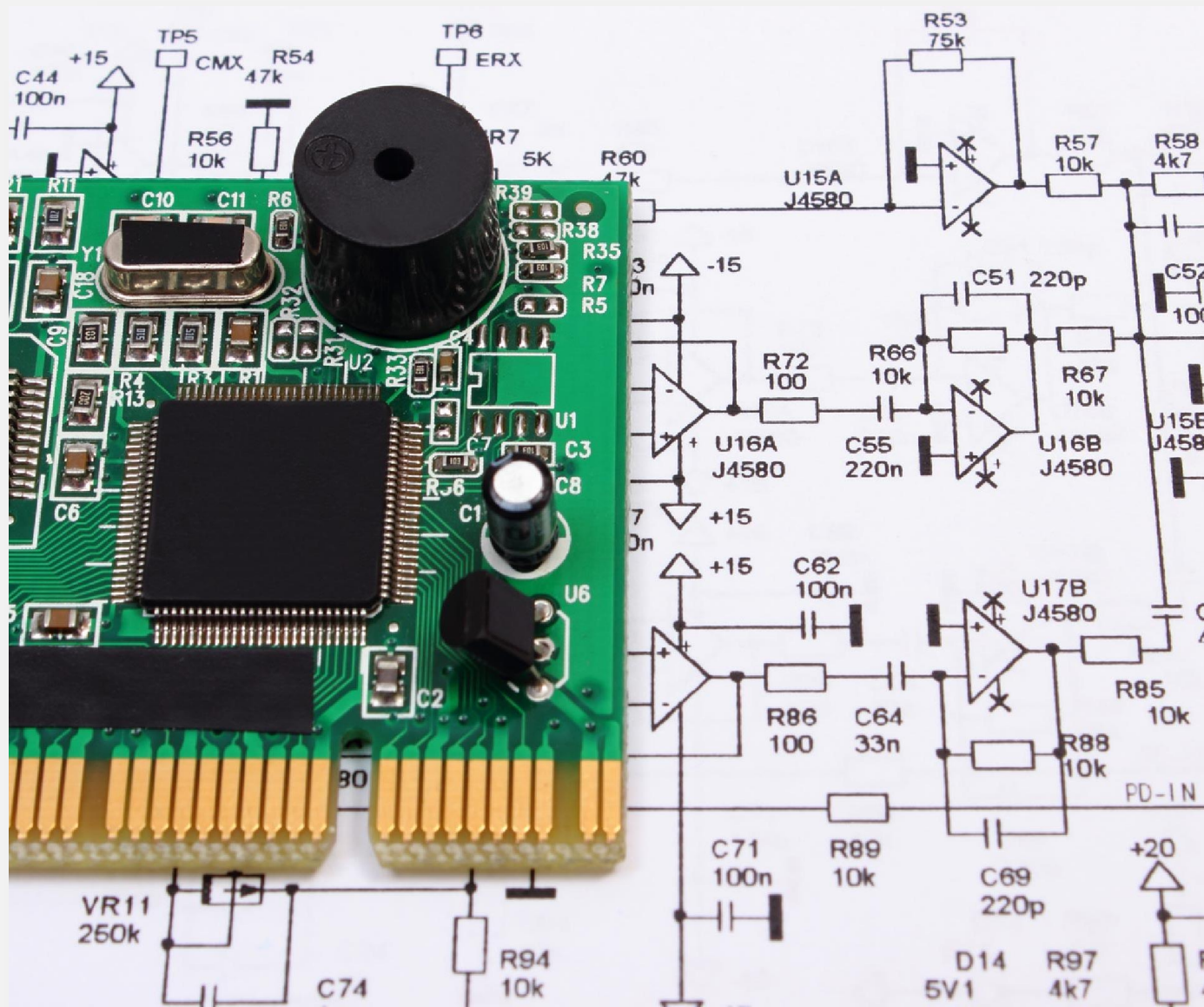
## 人工智能实现线上技术支持

- AI (Watson) 将关键词搜索添加到工程白皮书/应用笔记中
- 更多公司投资于实时线上支持
- 参数搜索变得更容易和更全面
- 社群回答工程问题变得更加健全

# 技术趋势 - 线上社群



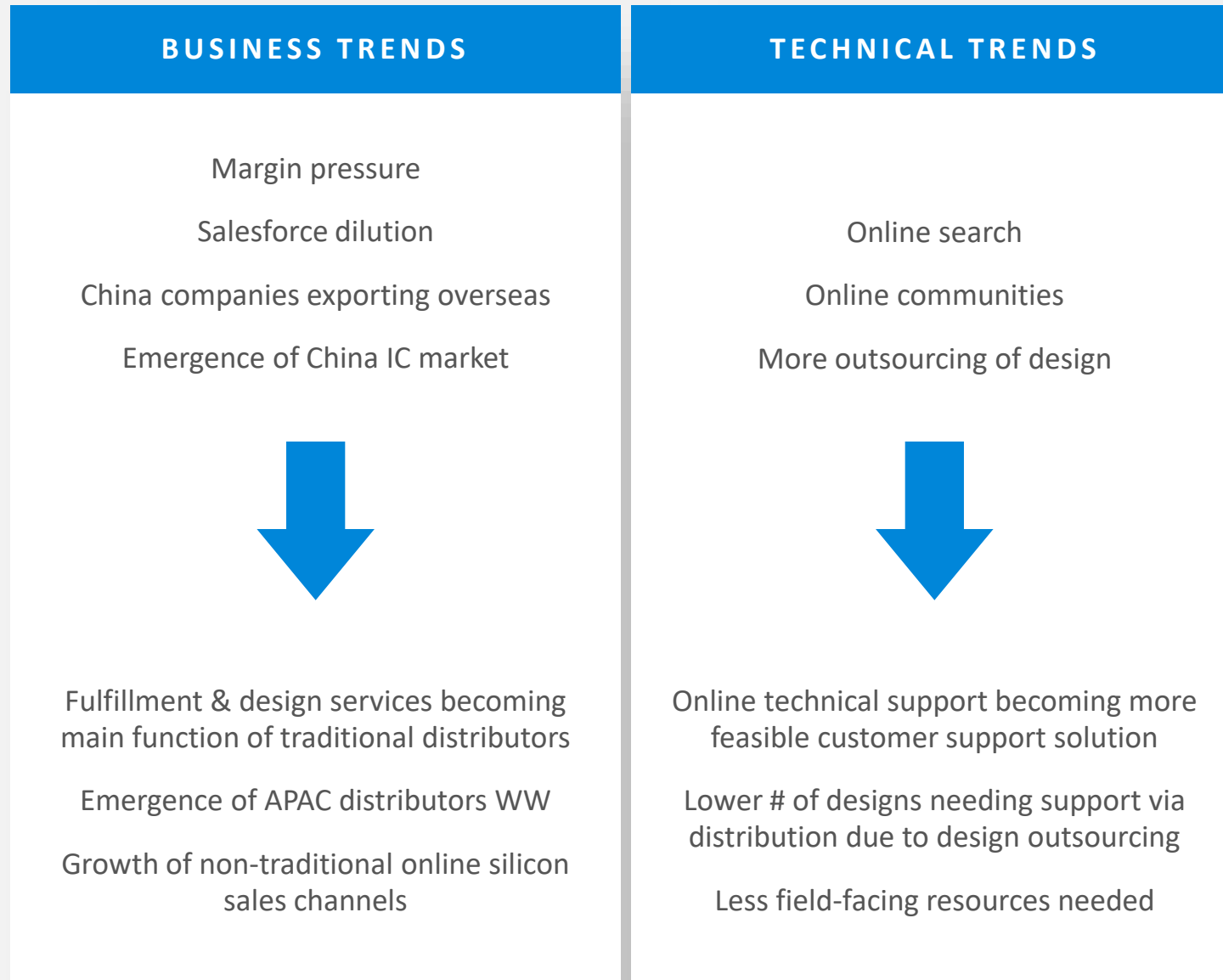
# 技术趋势 - 设计外包



- 随着电子设计变得越来越复杂（无线, 应用处理器等），IDH应用越来越受到青睐
- CM /经销商在电子设计中发挥更积极的作用



# 市场趋势





# 未来5 - 10年传统经销网络的演变

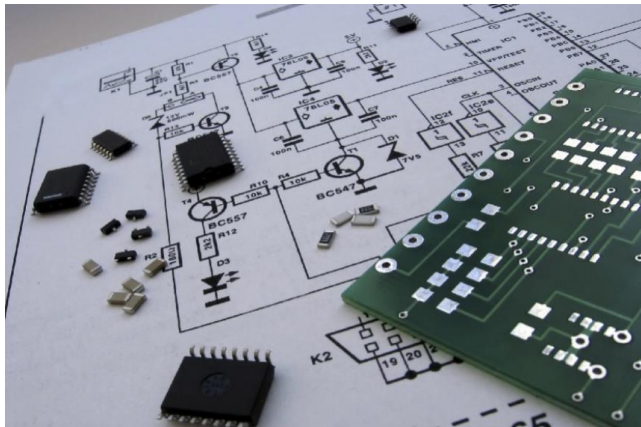
Worldwide Distributors (>\$10B)	APAC Distributors (>\$1B)	China Distributors (<\$1B)
<p>Field support becomes more diluted due to negative margin pressure</p> <p>Move towards fulfillment models</p>	<p>Gain traction in WW market due to Chinese customer WW adoption</p> <p>APAC margin levels able to absorb fulfillment models</p>	<p>Business gets consumed by APAC/ WW distributors</p> <p>Business model change to design house</p>
Global Online Distributors	APAC Online Distributors	Other (TaoBao, Alibaba etc)
<p>Continue to be popular with large OEMs</p> <p>Challenges maintaining continued momentum with mass market</p>	<p>Challenges to create large scale business due to infrastructure needed for economies of scale</p>	<p>Mass adoption by mass market</p>

# 下一阶段

## Global distributors move toward design services & fulfillment model

Reduced margin and online technical resources reducing field effectiveness

Focus demand creation value on design services model



## APAC distributors win the global fulfillment battle

Expansion of Chinese customers

Flexible financial terms



## Online stores in China win in the mass market in China

Popular communities

Part availability

Ease of doing business



谢谢。

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