

FOR ENERGY EFFICIENT INNOVATIONS

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THINK ON.

半导体渠道之古今中外及未来

麦满权博士

安森美半导体亚太区副总裁

Public Information



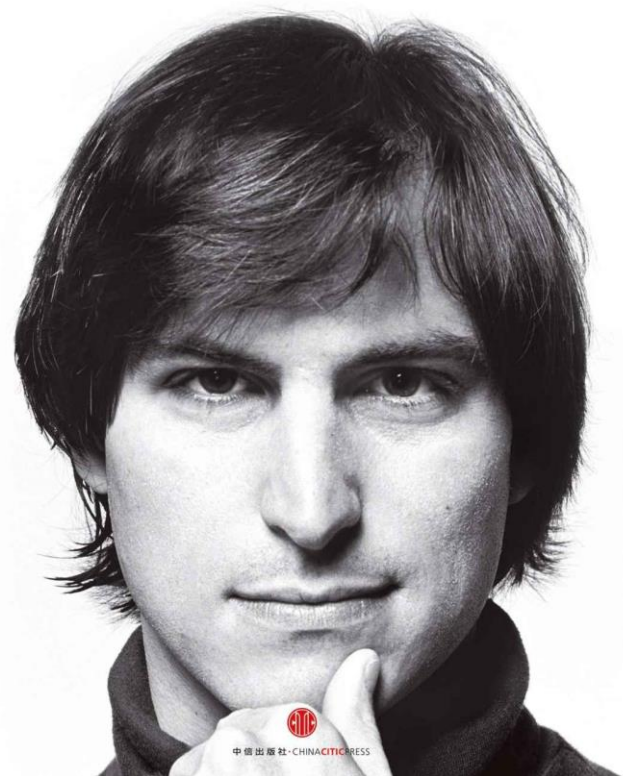
话说天下大势

分久必合，
合久必分。



蓝盒子 (Blue Box)

Steve Jobs by Walter Isaacson 史蒂夫·乔布斯传
[美] 沃尔特·艾萨克森◎著



Public Information

无线电自制套件Radio Shack \$7.95 DIY Kit

SEE 1969's CB TRANSCEIVERS ON PARADE

elementary JANUARY-FEBRUARY '69
Electronics

Facts, figures, photos, prices for 5-watt rig after 5-watt rig! Parade starts on page 65

SEEING IS BELIEVING!

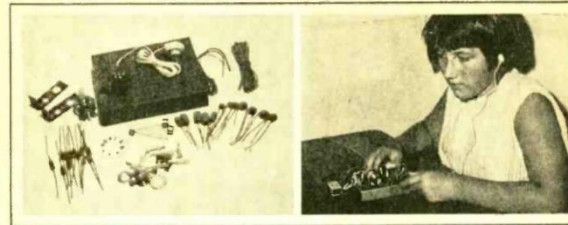
Pair our varactor-controlled
DIO-TRACE GENERATOR
with any scope and sweep
in the cleanest IFs ever!



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CZECH RADIO IN THE 9 DAYS
THAT SHOOK THE WORLD**

- ELECTRONIC LIGHTMASTER FOR YOUR CAR—it's automatic!
- SELF-PROGRAMMING COMPUTER GLITCH BOX—amaze your friends!
- LIQUID ELECTROLYTIC SEMICONDUCTOR—for junior scientists!

\$7.95 buys this



BEGINNER'S SHORTWAVE RECEIVER

This handy rig rides SW like crazy and really socks it to ya!
By Bill Britton

All too often the so-called beginner's kit is either too difficult to assemble, requires additional components (which you discover only after the project is almost completed), or gives performance worth about a tenth of the selling price. So let's say you're a novice at construction and would like to tackle something that is worthwhile, something that's really designed with you in mind.

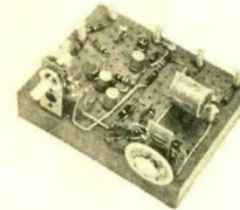
What to do? Simple! Latch onto the Radio Shack Science Fair 3-transistor shortwave radio kit. It costs but \$7.95, and gives you more than your money's worth in performance. Add a simple handsread and volume control, as we'll show later, and you'll have an SW radio as good as Pop used to use way back when.

The Science Fair SW radio kit employs one transistor as regenerative detector, a hook-up famed for phenomenally high sensitivity, and a minimum of circuitry. (It's also known for poor selectivity—the ability to reject signals near the desired one, but then you can't have everything for \$7.95.) In addition, two stages of AF am-

plification pump plenty of volume from the crystal earphone supplied with the kit. As supplied, the receiver will tune from 3 to 40 MHz, depending on the coil in use. But like most regen circuits of this type, it is really "hot" only to about 20 MHz.

A New Idea. The Radio Shack SW kit utilizes a new type of "beginner's assembly technique" that's amazing only in the sense that no one has thought of it before. The box the kit is packaged in is made of heat-resistant plastic and has a keyed perf board on one side; the holes are labeled from 1 to 16 across the top and from A to M along the side. The builder simply installs the components on the perf board exactly as shown in the almost full-scale pictorial.

Spring-type push terminals are used for external connecting points, such as the antenna, battery, and headphones. The regeneration and tuning controls mount on pre-drilled brackets supplied with the kit. Unlike most other kits in this price range, tie-point terminals are not used. Instead, the com-



Completed beginner's receiver without modifications. Coils pop right into springs.

JANUARY-FEBRUARY, 1969

75



从1995 到 2019

Company (Purchasing)	Sales
Arrow Electronics Inc.	US\$4,000M
Avnet Inc.	3,510M
Pioneer-Standard	1,282M
Future Electronics	1,150M
Marshall Industries	1,116M
Wyle Electronics	1,078M
Premier Industrial	594M
Bell Industries	564M
TTI Inc.	383M
Bell Microproducts	347M

Company (Gartner)	Sales
Arrow Electronics	US\$16,209M
WPG Holdings	16,175M
Avnet	14,193M
WT Microelectronics	10,807M
Macnica Fuji Electronics	3,928M
Toyota Tsusho	3,859M
Future Electronics	3,859M
Edom Technology	3,119M
Supreme Electronics	3,003M
S.A.S. Dragon	2,495M

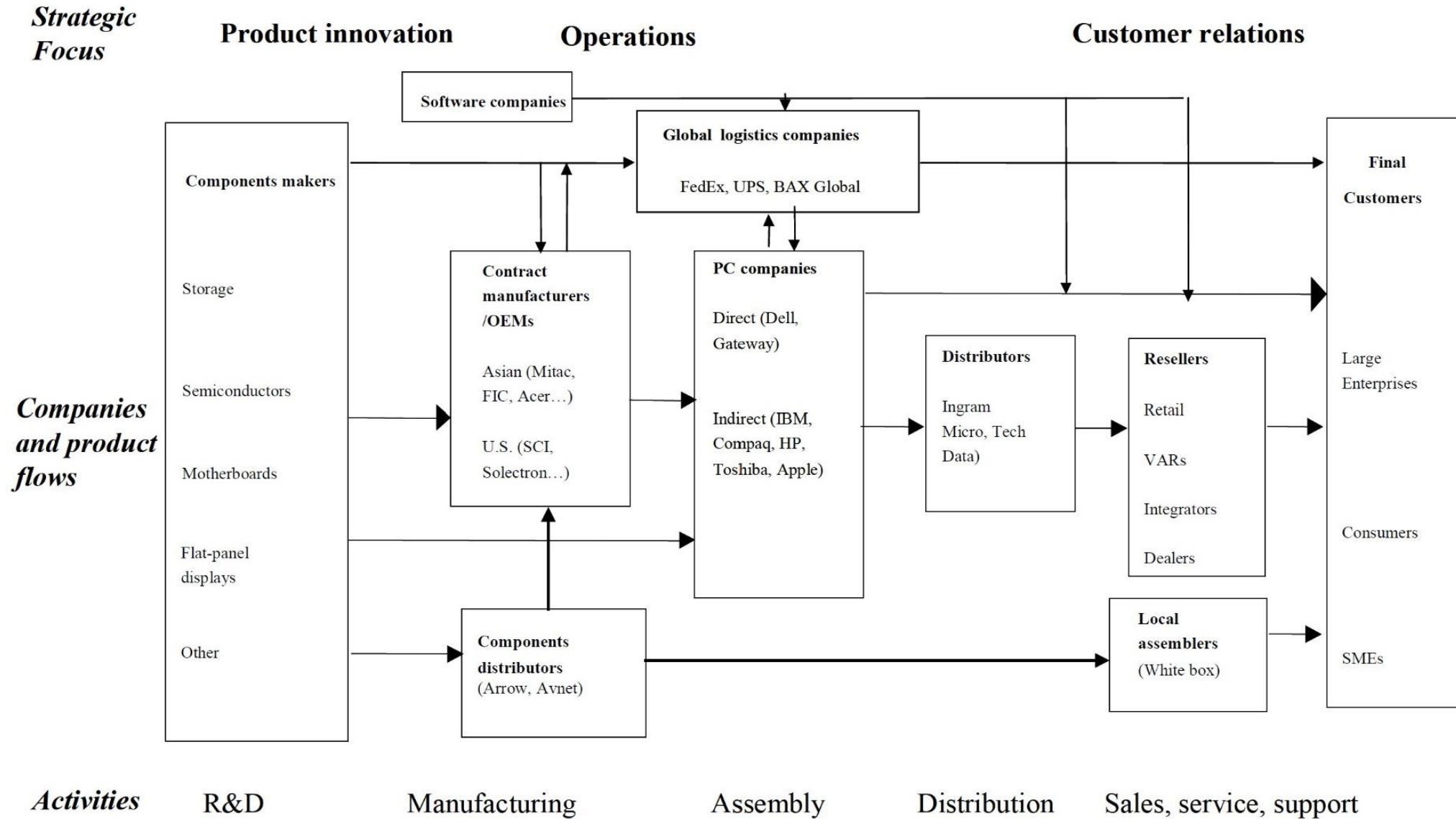
观察:

- 美资代理商的高度整合
- 台资代理商的崛起

3C – 计算机，通信，消费类电子产品

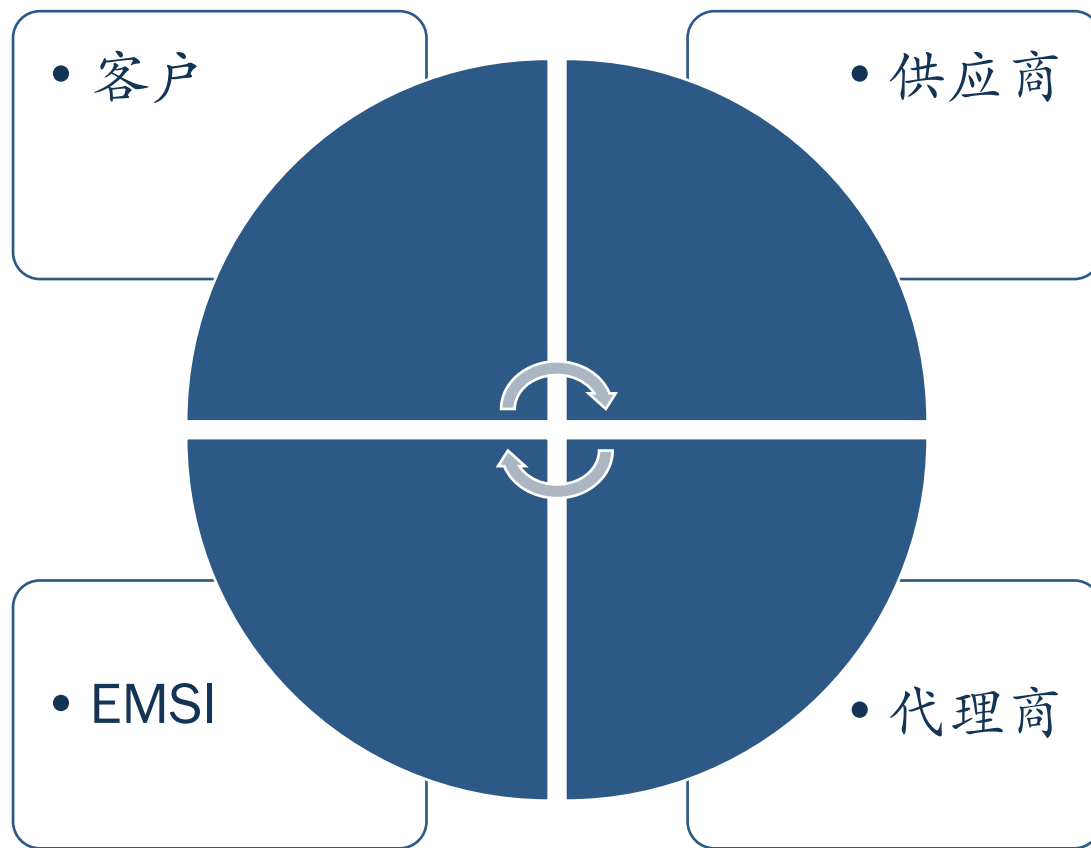


PC 产业价值网络 by Dedrick and Kraemer (2002)



生态圈

产业	市场规模(2019)
半导体	US\$ 412B
电子合约制造商(EMSI)	US\$ 500B
半导体分销	US\$ 144B



小总结

- 电子产业的高速發展
- 全球贸易的简易化
- 资本市场的强大力量
- 代工模式的普及性
- 供应链技术進化和系統优化

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Edom Technology	3,119M
Supreme Electronics	3,003M
S.A.S. Dragon	2,495M

历史为鉴，展望未来

- 电子产业的高速發展
- 全球贸易的简易化
- 资本市场的强大力量
- 代工模式的普及性
- 供应链技术進化和系統优化
- 贸易壁垒和保护主义
- 市场两极化，或三极化
- 国产芯片国际化
- 供应链技术和人工智能(A.I.)普及化

链链双扣



每天一点点 (1%)

原地踏步 $1^{365} = 1$

供应链

$0.99^{365} = 0.0255$

需求链

$1.01^{365} = 37.78$

《三国演义》第一百二十回

荐杜预老将献新谋
降孙皓三分归一统



供应链 + 需求链 = 价值链

中，美，台资鼎立
中国渠道商大整合
市场两极化

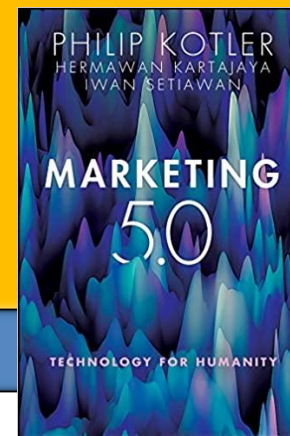
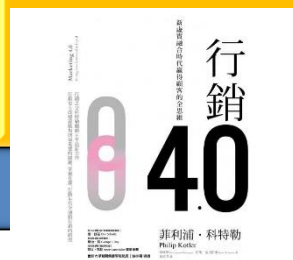
强化资本

建立差异性优势 (VRIO)

强化国际商贸能力

大数据化

Marketing 5.0



桃园三结义 - 原厂, 客户, 代理商



不吝赐教，谢谢！



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