

## Market Environment and Business Development

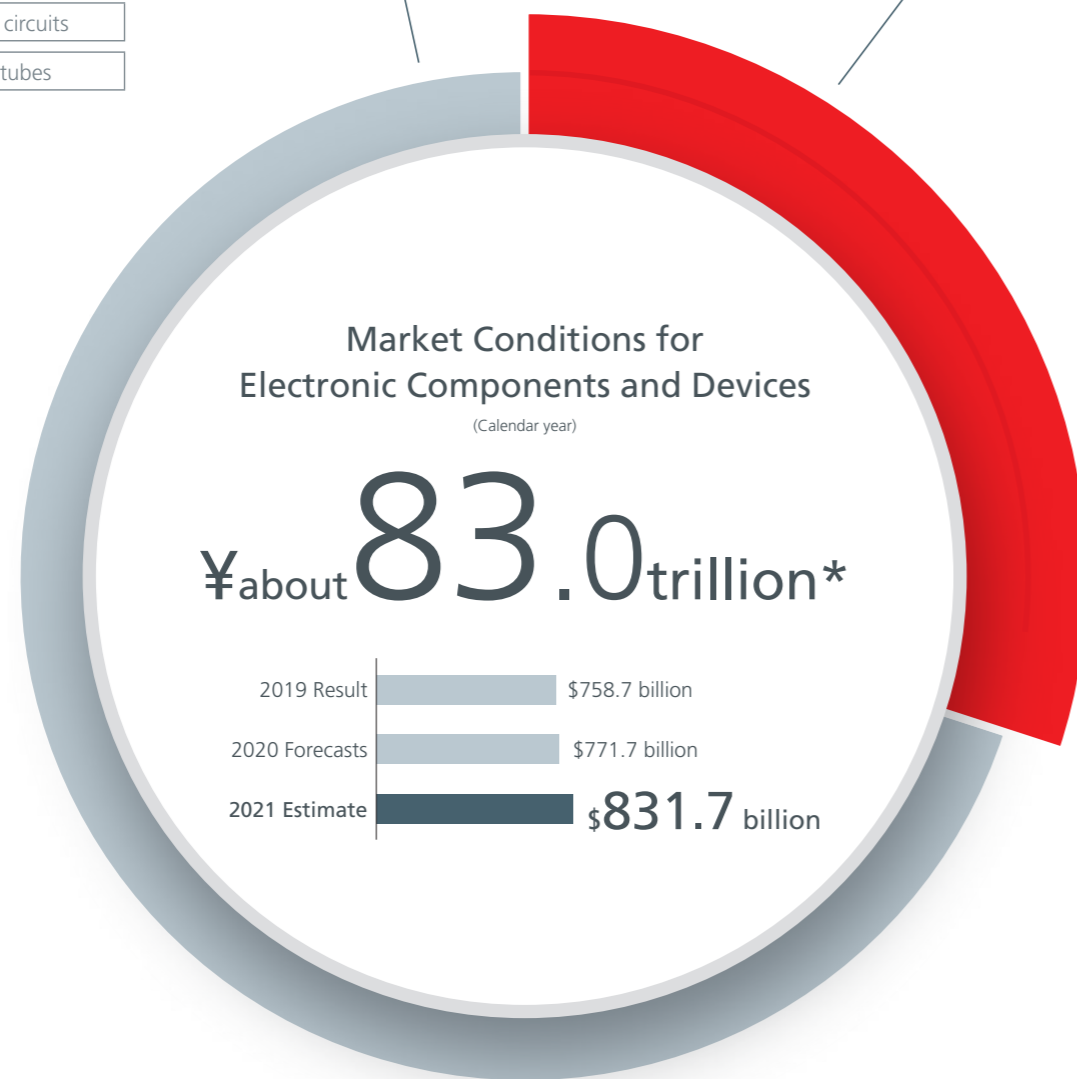
# Continued Growth in Needs as a Result of Greater Electronics Use

Needs for electronic components are expanding, and actual demand, although in varying degrees, is exhibiting an upward trend due to the proliferation of smartphones and the greater use of electronics in automobiles and other products that had remained free of electronics until now.

Electronic devices ¥ about **59.7 trillion\***

Devices that apply functions of electrons to perform active tasks such as amplification

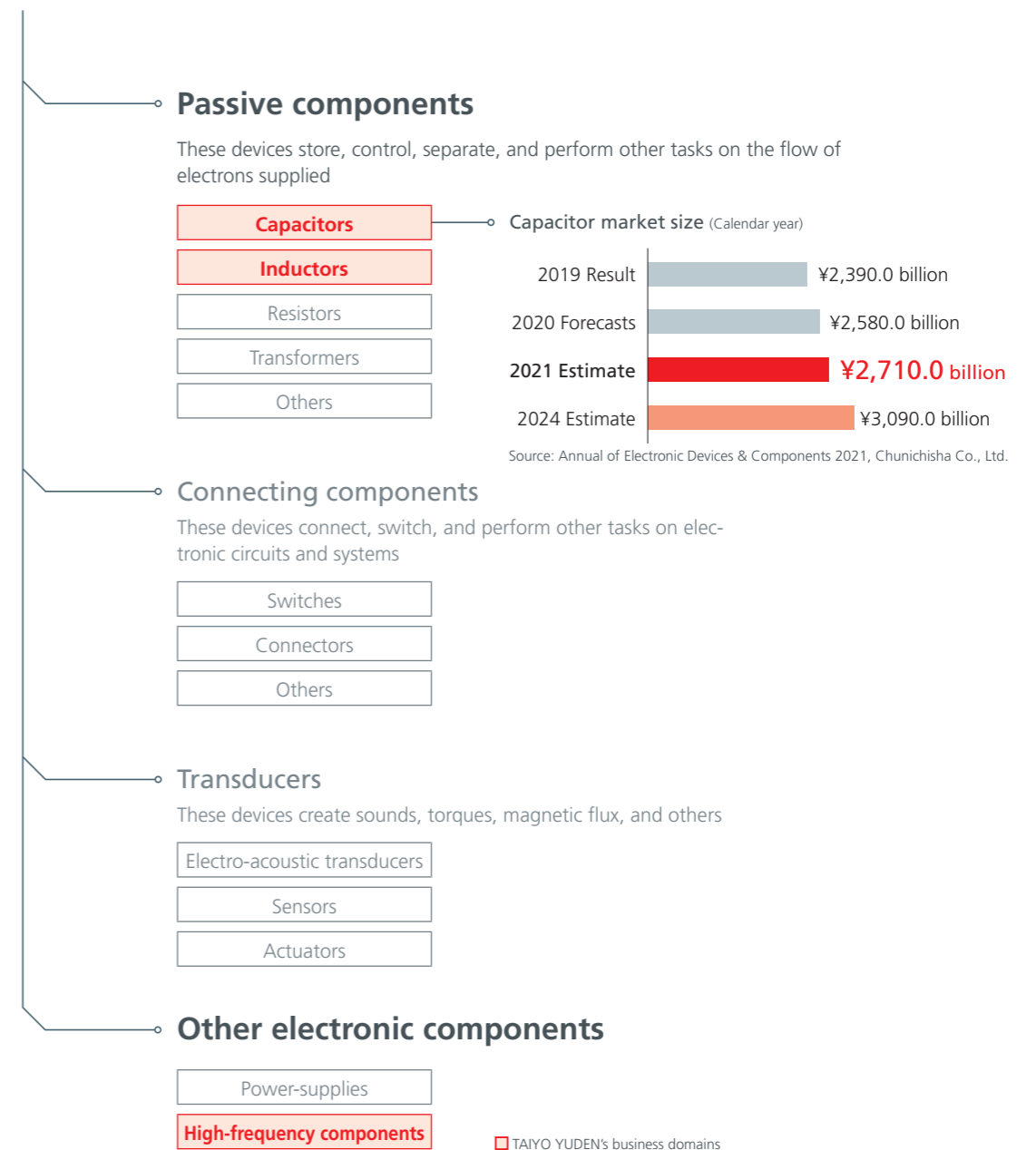
- Semiconductor devices
- Integrated circuits
- Electron tubes



General electronic components

¥ about **23.3 trillion\***

Components that work with and supplement electronic devices



\* The forecasts as of 2020 (dollar-based) calculated using the average exchange rate for 2020 (1 dollar = ¥107.5).  
Note: Figures from 2020 Production Forecasts for the Global Electronics and Information Technology Industries, Japan Electronics and Information Technology Industries Association (JEITA); the electronic components and devices category is as defined in JEITA's statistical breakdown of global electronic component shipments