

May 5, 2023

European Components Distribution (DMASS) grows amid improvements in availability.

Key facts:

- European Components Distribution grows by 15.2% to 5.9 billion Euro.
- Semiconductors finish at record 4.08 billion Euro.
- Different pace in Semiconductors and Interconnect, Passive & Electromechanical.
- Demand slightly softer, availability improves.

Key quote:

Hermann Reiter, Chairman DMASS Europe e.V.: “The surprising revenue growth in Q1 cannot hide the reality of full inventories in the channel. At the same time, we share the general optimism in the European industry that the slowdown will be short.”

Note to editors:

- DMASS Europe e.V. replaces DMASS Ltd. as reporting association.
- DMASS Europe represents min. 85% of European components DTAM.
- Due to additional members, revised history shows higher numbers than previous releases.

Berlin, May 5, 2023 – Topping last year’s record numbers, European components distribution ended the first quarter of 2023 with surprisingly strong sales numbers for both Semiconductors and IP&E (Interconnect, Passive and Electromechanical) components. Semiconductors in Q1 grew by 22.9% to 4.08 billion Euro, IP&E by a much more moderate 0.9% to 1.82 billion Euro. Q1 in total grew by 15.2% to 5.9 billion Euro.

Hermann Reiter, chairman of DMASS: “After Q4 of 2022 it was hard to imagine that our market will grow again, both year over year and sequentially, specifically since the slowdown in orders was visible for a few months now. The surprising revenue growth in Q1 cannot hide the reality of rather full inventories in the channel. At the same time, we share the general optimism in the European industry that the slowdown will be short. As our core business segments aren’t PCs and smart phones, but thriving segment like automotive and industrial, we are confident that after the inventory digest, demand will grow again dynamically.”

Semiconductors (Q1):

With a total of 4.08 billion Euro, DMASS delivered the highest ever reported semiconductor revenues. The growth occurred across all countries and regions although in varying pace. Of the major countries, Germany recorded the highest increase.

Product-wise, Micros, Programmable Logic and Other Logic (ASICs, ASSPs) showed the highest growth, followed by Analog products (details see tables).

Country/Region Semiconductors	Total €	Change Q1/Q1
UK	243.749	6,48%
IRELAND	43.758	60,22%
GERMANY	1.200.602	32,34%
FRANCE	278.447	22,80%
ITALY	403.004	24,63%
SWITZERLAND	158.344	21,38%
NORDIC	337.374	30,63%
BENELUX	163.169	28,51%
IBERIA	168.694	22,16%
AUSTRIA	122.485	36,65%
RUSSIA	16	-99,98%
EASTERN EUROPE	702.577	25,36%
ISRAEL	149.445	1,21%
TURKEY	73.081	24,69%
OTHER	34.022	13,73%
DMASS Semiconductor Total	4.078.765	22,87%

Product Group Semiconductors	Total €	Change Q1/Q1
DISCRETE	214.606	-8,77%
POWER	461.825	16,92%
SENSORS & ACTUATORS	122.916	22,02%
OPTO	280.811	-3,63%
ANALOG	1.185.482	29,06%
MEMORY	332.816	-1,90%
MOS MICRO LOGIC	870.628	36,00%
PROGRAMMABLE LOGIC	322.465	83,51%
STANDARD LOGIC	53.417	-0,92%
OTHER LOGIC	233.800	37,94%
DMASS Semiconductors Total	4.078.765	22,87%

Interconnect, Passive and Electromechanical Components (Q1):

The IP&E segment showed a surprising sequential uptick of 15% versus Q4/22, but a tiny growth of 0.9% to 1.82 billion Euro versus Q1/22. Growth distribution across

countries was totally different from semiconductors (which is mainly due to a different membership structure in IP&E). While Passives decreased by 2.3% (special passive components saw an increase), Connectors and Electromechanical components as well as Power Supplies remained positive (details see tables).

Product Group IP&E	Total €	Change Q1/Q1
PASSIVES	711.917	-2,31%
ELECTROMECHANIC	979.904	2,61%
POWER SUPPLIES	124.047	7,60%
DMASS IP&E Total	1.815.868	0,94%

Country/Region IP&E	Total €	Change Q1/Q1
UK	181.013	4,90%
IRELAND	13.004	12,33%
GERMANY	457.910	1,58%
FRANCE	169.060	3,34%
ITALY	202.983	0,31%
SWITZERLAND	58.280	-0,37%
NORDIC	161.425	1,89%
BENELUX	90.495	-1,90%
IBERIA	95.248	5,94%
AUSTRIA	55.121	6,98%
RUSSIA	0	-100,00%
EASTERN EUROPE	232.909	3,10%
ISRAEL	39.031	-14,32%
TURKEY	37.552	36,84%
OTHER	21.837	5,63%
DMASS IP&E Total	1.815.868	0,94%

Chairman Hermann Reiter: “The growth curves in Semiconductors and IP&E have been quite different for a while, with IP&E growth peaking a few quarters before semis. Therefore, we have been positively surprised in Q1. What is also visible is that special components on both sides are still seeing growth peaks which may indicate a shift away from standard technologies.” However, the special situation in distribution, compared to a total market that sees stronger skid marks, makes a prediction difficult, said Reiter: “Bookings have certainly decreased but not to the extent we have feared. We would expect a slowdown for 2023, but at moderate levels, and see a lot of optimism from customers for the long-term prospects of the components business in Europe.”

About DMASS:

DMASS Europe e.V., (until recently DMASS Ltd.) a European non-profit organisation, is the only industry body that collates detailed electronic components distribution market data on a quarterly basis by country and product groups such as Microcontrollers, Flash Memories, Analog components, Passives, Electromechanical products and many more.

DMASS was founded in 1989 and provides its members with a reliable statistical tool to evaluate their relative mass-market performance. The organisation consists of 40 active members in 2022 and represents between 80% and 85% of the total European distribution market, depending on the regions. To continuously increase its European market coverage, DMASS welcomes new membership applications from distributors and electronic components manufacturers.

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DMASS Statistics:

Manufacturer Members

ams OSRAM
Analog Devices
Diodes Zetex
Infineon
ISSI
Kemet
KIOXIA Europe
Littelfuse
Macronix

Distributor Members

Anglia
Arrow
Avnet EMEA
Codico
Digi-key
EBV Elektronik
Elfa-Distelec
Farnell
Future

Micron
Murata
Nexperia
NXP
onsemi
Panasonic
Phoenix Contact
Renesas Electronics Europe
Rohm Semiconductor
Samtec
STMicroelectronics
TDK
TE Connectivity
Toshiba Electronics Europe
Vishay Semiconductor
Western Digital Corporation
Winbond

Mouser
RS Components
Rutronik
TTI
WPG EMEA