

## The Pulse of the Industry

I read a great deal of interconnect industry analysis that, more often than not, misses the boat on the business trends, pressures and values that truly affect our business. But several times recently I have been surprised by what I believe are some rather insightful observations—so much so that I would like to share a few of them with the Glenair family:

(1) Aerospace, defense and other high-reliability industries are generally poised for growth, particularly in high-touch technology areas where robust technical support and high levels of service are key customer requirements.

(2) The defense industry will likely see niche defense spending increases for US and NATO affiliates re-tooling for enhanced special-forces deployment in terrorist hotspots such as Iraq and Syria. Regional military growth in United Arab Emirates (UAE), Saudi Arabia, India, South Korea, Singapore and Japan will fuel additional growth as these countries continue to equip their fighting forces with modern defense platforms and technologies in such area as cyber security, C4ISR communications, precision strike, remote sensors and unmanned aerial systems.

(3) Commercial aircraft manufacturers will continue to set new records for aircraft production with no apparent end in sight. Several trends are contributing to the unprecedented backlog in commercial aircraft orders including accelerated replacement of older aircraft with more fuel-efficient designs, the continued growth of the affordable leasing sector and a burgeoning worldwide passenger travel demand, especially in the Middle East and the Asia-Pacific region.

(4) Global sourcing woes such as rising wages in Asia, higher shipping costs and pressure to meet aggressive delivery schedules and time-to-market standards, has led many OEM's to retreat from off-shore outsourcing and once again seek out domestic partners (such as Glenair!) for their most challenging, mission-critical projects.

As a first-world based manufacturer, our approach has always been to focus on the customer service deliverables of greatest value to our customers—from responsive engineering and technical support services to rapid prototyping and short lead-time production. The ability to truly understand the customer's complete range of requirements (to genuinely "speak their language") has indeed led many OEM's to change their view of low-cost manufacturing zones and instead turn to reliable, local partners such as Glenair. Lately, such work has evolved to include complete electronic subsystem design and manufacture, particularly in highly-technical opto-electronic applications but also in more mainstream Ethernet and USB electronics.

As highlighted in this issue, Glenair now fields a special in-house team of engineers and operations experts with deep fluency in printed circuit board design, layout, assembly and test. This advanced PCB capability, combined with our world-class interconnect and packaging expertise, enables Glenair to design, prototype and deliver increasingly complex electronic and opto-electronic sub-systems and interconnect assemblies. The combination of these burgeoning in-house capabilities with the positive trends we see in our industry will make for exciting and fun days ahead.

*Chris Toomey*

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