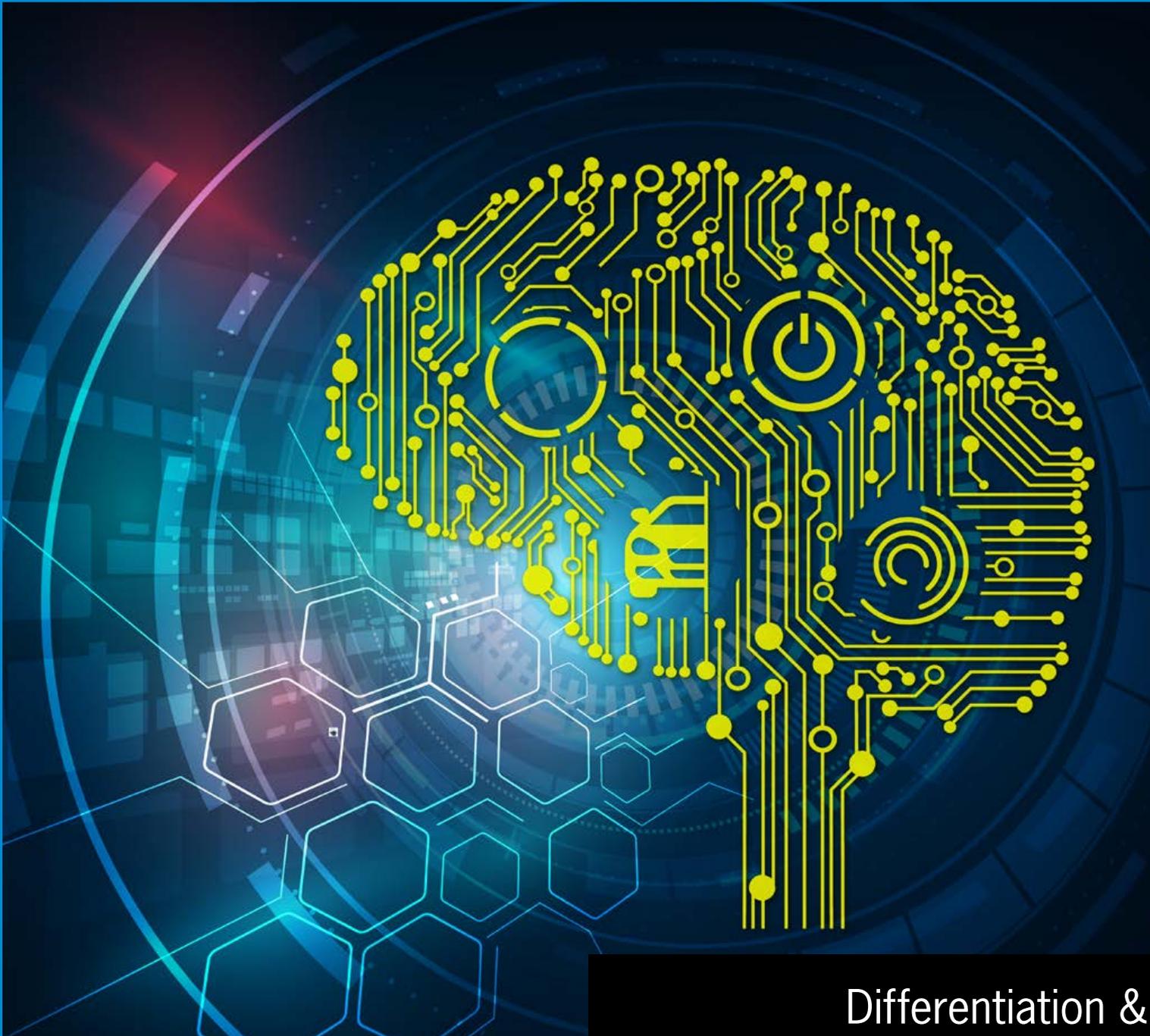


**RUTRONIK**  
ELECTRONICS WORLDWIDE



Differentiation &  
Unique Selling Proposition

Committed to excellence

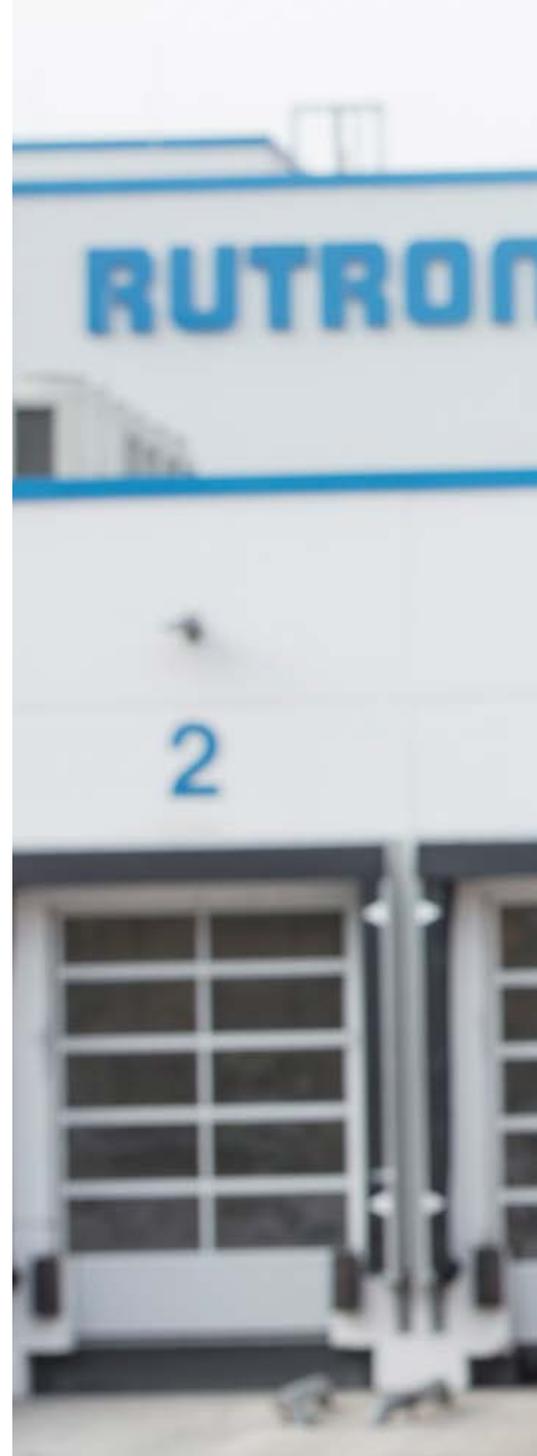
# Committed to Excellence

Unique Selling Proposition. What Makes Us Stand Out.

“Trust is the most important thing in a good business relationship.” This is how Rutronik’s founder, Helmut Rudel, defined the company’s guiding principle. Long-term, sustainable decisions create certainty and trust – both within Rutronik and with our partners. As an owner-operated and completely independent company, we are not driven by quarterly results, but by a long-term strategy.

Rutronik employs more than 1,600 people in over 75 locations worldwide. Together, we broke the billion euro sales barrier in 2018. The company has grown organically as a result of its long-term strategy and has changed time and again over the years, adapting with flexibility to the market situation – without any acquisitions or knee-jerk decisions. The result is a uniform global infrastructure.

Rutronik is committed to high standards, and they can only be achieved with satisfied, motivated employees. This is why Rutronik supports its employees with a comprehensive advanced training program. As a customer, you also benefit from this in a variety of ways.



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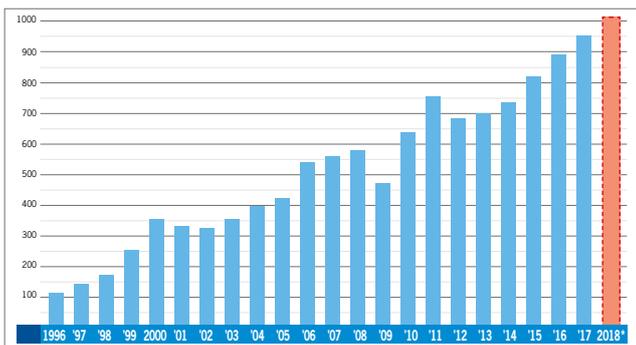
## Topics

- Owner-operated – No sudden decisions driven by quarterly results
- Long-term strategy – Meticulous project planning (warehouse expansion in Eisingen, e-commerce platform R24)
- Lean organizational structure – Clear responsibilities and points of contact
- Stable management structure – No short-term changes in personnel
- Long-term employee development – Employees gain new expertise in-house





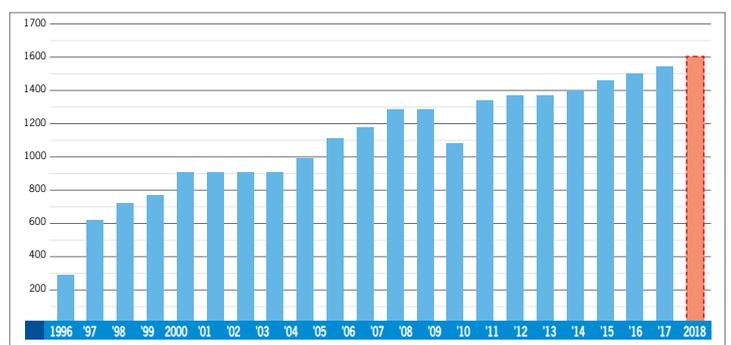
### Revenues



\*Forecast 2018

Revenues in million €

### Number of Employees



# Electronics. Worldwide.

Thinking Globally. Acting Locally.



**Global Processes. Local Solutions.** Rutronik has more than 75 offices in 33 countries throughout Europe, North America, and Asia. Thanks to our standardized IT and logistics infrastructure, we offer our services to customers around the globe in accordance with German standards of quality, resulting in a comparable price and service level worldwide. Every location utilizes the same infrastructure and has access to the same information and data – at all times. Rutronik is constantly expanding to guarantee that our customers receive outstanding support at all times, in line with our slogan “Committed to excellence” – yet always with sound judgment and foresight and not driven by quarterly results. Our long-term, balanced strategy makes us the perfect partner for your project.



More than 75 offices in 33 countries worldwide.  
Over 1,600 employees.  
Locations in Europe, North America, and Asia.

# Four Pillars. One Goal. Our Strengths. Your Benefit.



Rutronik is a reliable partner for its customers in many ways. Our expert team of field application engineers, product managers, and sales representatives support customers from the initial idea through the project's planning stage to manufacturing and post-sales support. Centralized process management guarantees a standardized level of service and support worldwide. The business model with global logistics solutions can be scaled worldwide and offers both dependability and security: the company's high-performance data center acts as a central data warehouse for all Rutronik subsidiaries and does not require cloud-based storage solutions, features a redundant design, and is therefore completely failure-proof at all times. Thanks to the company's comprehensive mix of components, Rutronik also offers every component required for an application.



## Consult – Know-how. Built-in. Rutronik's technical expertise

Worldwide and personalized consulting at your place of business by knowledgeable sales staff, application engineers, and product specialists.

- Worldwide and Personalized Consulting
- Application Consulting
- Business Consulting
- Direct Relationships with Franchise Suppliers



## Components – Variety. Built-in. Rutronik's product portfolio

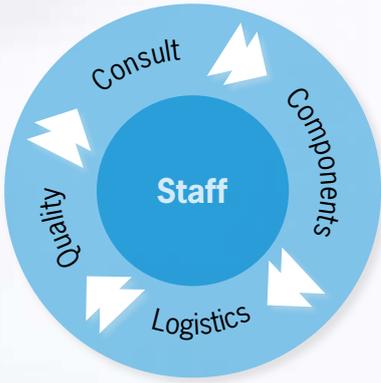
A wide range of electronic components and embedded and wireless technologies to perfectly cover all of your needs.

- Semiconductors
- Passive Components
- Electromechanical Components
- Embedded & Wireless
- Monitors & Displays
- Boards & Systems
- Storage Technologies
- Wireless Technologies



# The Foundation of our Success: Our EMPLOYEES





**Facts about Rutronik. At a Glance.**

- Broadline distributor of electronic components for all fields (Semiconductors, Passive, E-Mech, Embedded, Data Storage, Wireless Portfolio, Batteries) with 28 billion parts permanently available
- More than 80 billion units shipped annually
- Large inventory and advanced backlog management
- High equity ratio to achieve higher availability of inventories
- Line card with leading suppliers – with worldwide franchises
- Entire portfolio available from alternative product sources (dual sourcing approach)
- The only full service provider for all components
- Also full service provider for low-priced goods – also for large quantities of C parts for the supply chain



**Logistics** – Reliability. Built-in.  
Rutronik's delivery service

Innovative and flexible solutions: from supply chain management to individual logistics systems.

- Consulting
- Value Added Services
- Communication & Networking
- Logistics Fulfillment
- Logistics Modules
- Procurement



**Quality** – Security. Built-in.  
Rutronik's uncompromising quality management

The integrated management system (IMS) encompasses quality control, information security, environmental protection, occupational health and safety.

- Certified Quality Management System
- Certified Environment, Health and Safety System
- Certified Information Security System
- Constant Monitoring of Processes



Over 1,600 employees | Over 75 locations worldwide  
Specialized, highly qualified employees in all departments and  
at all locations

# Centralized Processes. Worldwide.

## Exceptional Quality. For Your Project.

Rutronik's centralized process management (ISO certification, etc.) guarantees a consistent, high level of service and support worldwide in accordance with German quality standards. The business model with global logistics solutions can be scaled worldwide and offers both dependability and security: the company's high-performance data center acts as a central data warehouse for all Rutronik subsidiaries and does not require cloud-based storage solutions. In this context, information security is a top priority: Rutronik is certified to ISO 27001 which is currently only required by law for "system-critical" companies such as energy suppliers and airports. Rutronik therefore meets the highest security standards.

### Doing Our Best for Our Customers. Every Day.

Our standardized processes across the globe, our integrated quality management, and our uniform prices are all tangible benefits for our customers. With its highly qualified team of field application engineers, Rutronik offers expert, reliable on-site support in numerous countries worldwide – for start-ups, small, mid-sized, and large companies alike.



## The Benefits. At a Glance.

- Worldwide shipping and support in accordance with German standards of quality
  - Business model can be scaled worldwide
  - Identical level of service and support for all customers across the globe
  - In-house, high-performance data center
  - Single data source worldwide
  - Global logistics solutions and eProcurement traceability
- Quality guaranteed regardless of national standards
  - Adapted to local conditions
  - Coordinated communication at all levels
  - Data security via in-house data storage (in-house data center)
  - Same level of information for all employees worldwide
  - Outstanding flexibility and traceability around the world

### Rutronik's Business Model vs. the Competition



Rutronik



Competitors



## Optimizing Processes and Services. Creating Advantages.

### **Competitive and Transparent. With Foresight.**

Within Rutronik, many different departments and teams work globally on a wide variety of projects. Most of them cannot be solved exclusively within one department, but require resources from other areas. In order to ensure that the various projects are carried out in an efficient and sustainable manner, an overarching organizational team works to identify, consolidate, and channel the projects and the necessary resources. This is how we create a unified structure and ensure that everything runs smoothly – both internally and externally.

## Internationally Comparable Standards of Quality.

### **Complaint Management. Simple and Straightforward.**

Rutronik relies on uniform standards throughout the world. This enables our quality management staff to respond to challenges quickly, easily, and in a straightforward manner, and identify potential roadblocks. This offers our customers tangible benefits: they can contact our complaints management team directly to resolve any outstanding issues. The employees on this team are familiar with the quality and complaint standards of the manufacturers involved, which means they can search for solutions together with those responsible – providing fast and hassle-free assistance to our customers.



# Logistics. Customized.

## Your Needs. Our Job.

### Needs-Based. Secure Supply.

Rutronik's modular logistics concept can be configured to create solutions that meet specific needs. The three base systems Delivery Schedule, Kanban, and Consignment can be combined to create a customized system through various parameters, combinations, and additional services. This includes extended label information, industry-specific (e.g. VDA-compliant) processes, customer-specific packaging solutions, forecasts, safety stock, bar codes, traceability solutions, and many more. Thanks to our automated processes, customers can reduce their procurement costs, simplify and streamline their processes, and enjoy supply security.

### Goods Enter and Leave the Eisingen Logistics Center on a Daily Basis. At a Glance.

Incoming	Outgoing
<ul style="list-style-type: none"> <li>More than 400 packages</li> <li>More than 100 pallets</li> <li>Up to 13,000 goods picked</li> </ul>	<ul style="list-style-type: none"> <li>Up to 290 million components</li> <li>Up to 40,000 labels</li> </ul>





**Flexible. Just Right.**

The numerous different services available to you at the Eisingen logistics center ensure that your goods are always picked, packed, and shipped exactly as you need them. Rutronik’s logistics services include configuring the labels, the type of scanning, affixing the delivery slips, various different types of packaging, and a variety of other additional services. In this process, our focus is always on the customer’s specific requirements. We regularly review our processes, change or expand our range of services, and obtain certifications.

**Customized Solutions with Individual Combinations of Logistics Modules**

Delivery System / System Support	Delivery Schedule	Kanban	Consignment
Forecast	■	■	■
Buffer stock	■	■	■
Min / Max	■	■	■
EDIFACT	■	■	■
Barcode	■	■	■
Traceability	■	■	■



# The Changing Face of the Distribution Market.

## New Requirements. Constant Challenges.



### Distribution. Then and Today.

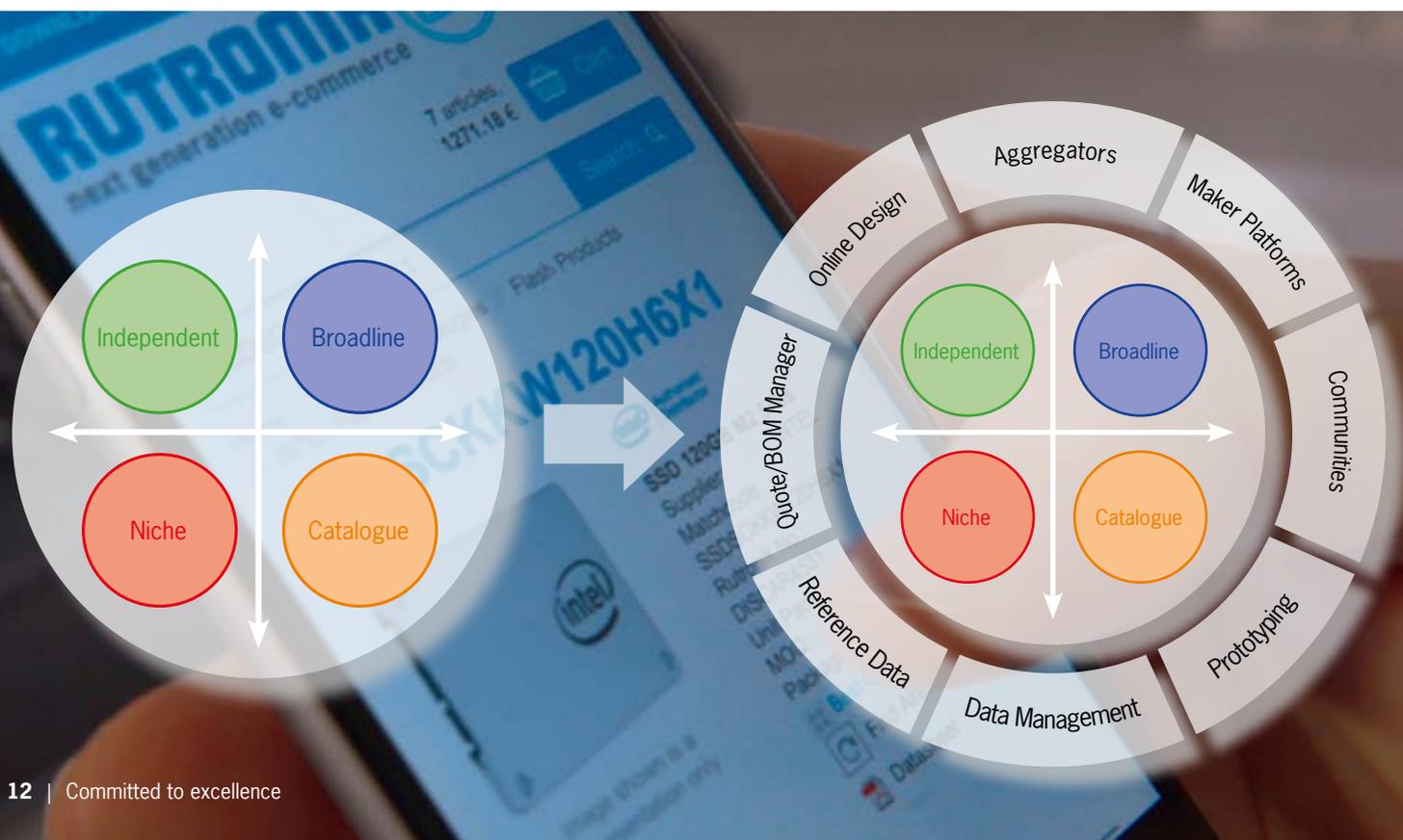
The distribution market is always changing. During the 20<sup>th</sup> century, clearly defined business models for distribution and a clear division of roles still existed – today mixed and overlapping business models and numerous online services compete with each other for the customer's attention. Rutronik closely monitors developments and constantly adapts its processes and services in order to be able to offer customers 360-degree support.

### The Challenges of Distribution. At a Glance.

- Mixed and overlapping distribution business models
- Surrounded by 1,000s of online services
- Everyone fighting for customers' attention
- Subscription and activity tracking
- Full service is expected
- Data management
- Online design assistance – prototyping support
- Communities
- Technical influencers
- Concentration in distribution sales channels
- Major mergers and acquisitions among manufacturers
- Differentiated supply chain
- Worldwide EMS and CEMs
- Market share growth strategy of public distributors

Distribution in the 20<sup>th</sup> Century

Distribution in the 21<sup>st</sup> Century





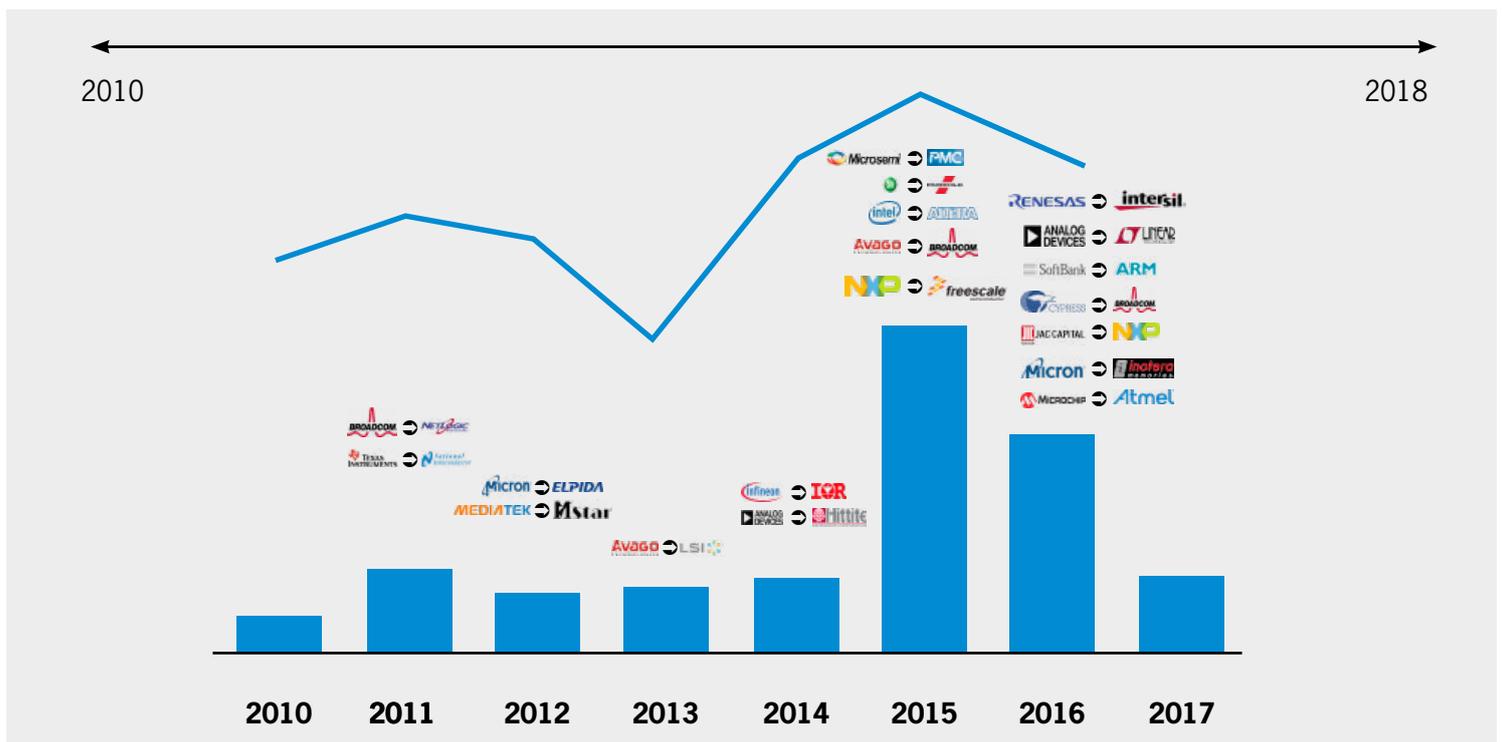
### New Brands. Different Goals.

The global demand for electronic components is rapidly increasing. This has attracted the interest of financial investors. As a result, mergers and acquisitions with a combined value of more than 100 billion dollars were completed in 2015 and 2016. This has enormous consequences for customers: fewer manufacturers of certain components and higher prices. A focus on shareholder value and fulfillment replaces a focus on the customer, demand creation, and design.

### Mergers and Acquisitions. At a Glance.

- Acquisitions with a total value in excess of \$100 billion completed in 2015 and 2016
- Mergers and acquisitions (M&A) cause huge shifts in the distribution channel
- Customers have only limited sources or only a single distribution channel
- Financial investors acquire component manufacturers
- Synergies in product portfolio and manufacturing processes
- Price changes – with tendency to increase
- Capacity constraints (small geometries) – partially due to higher demand and due to lack of investments
- M&As influence manufacturers' obsolescence strategy
- Changing distribution model
- No or little appreciation for demand creation/design
- Fulfillment margins for distribution
- Decision-making focused on shareholder value, not the customer

### Mergers and Acquisitions in the Manufacturers Industry



# 360-Degree Product Range. For Your Application.

## Broadly Positioned. For Maximum Delivery Reliability.

As a broadline distributor, Rutronik has a 360-degree product range that encompasses semiconductors, passive components, electro-mechanical components, as well as embedded and wireless products. Our broad portfolio is based on the dual sourcing approach. This enables Rutronik to offer alternative versions of every component, thereby guaranteeing excellent availability. And it goes without saying that Rutronik offers services for the entire product range, right down to capacitors and resistors.

### Every Component You Need. Only from Rutronik.

The changing face of distribution business models means that many companies specialize in certain product groups, shipping methods or volumes, or only offer these in certain regions. Of the twelve largest distributors in the world, only Rutronik offers

customers across the globe components from every product group, in large and small quantities, both online and offline – and also offers consulting services.

### Our Product Range. At a Glance.

- Broadline distributor for electronic components with 28 billion parts permanently available
- More than 80 billion units shipped annually
- Large inventory and advanced backlog management
- High equity ratio to achieve higher availability of inventories
- Line card with leading suppliers with worldwide franchises
- Entire portfolio available from alternative product sources (dual sourcing approach)
- Semiconductors, Passive, E-Mech, Embedded, Data Storage, Wireless Portfolio, Batteries
- Rutronik – the only full service provider for all components
- Full service, even for low-cost components



Semiconductors



Passive Components



Electromechanical  
Components



Displays & Monitors



Boards & Systems

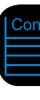


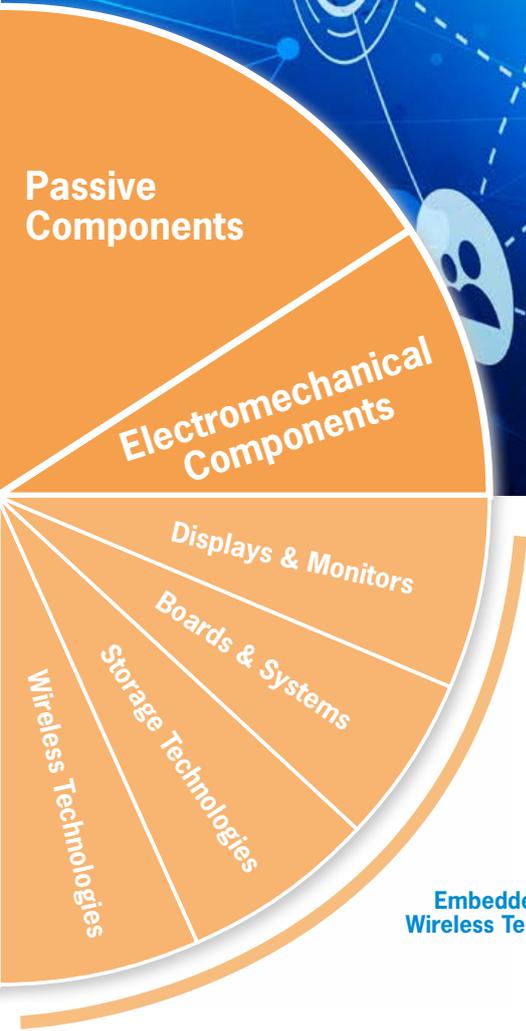
Storage Technologies



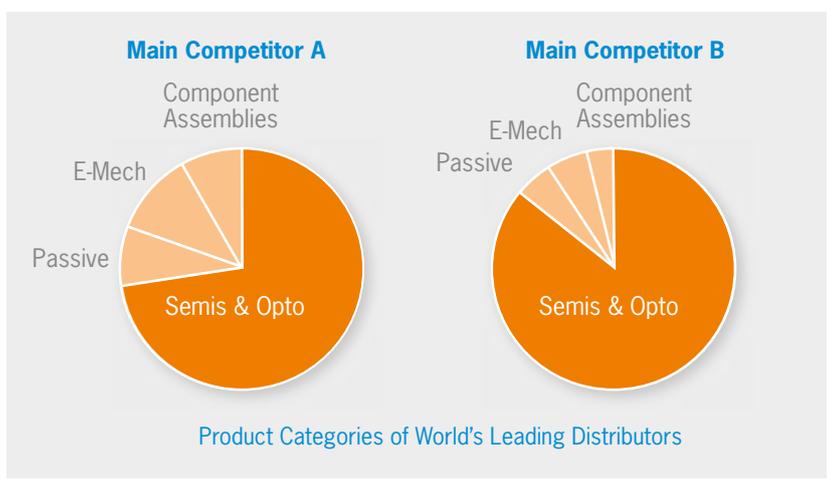
Wireless Technologies

Rutronik's Product Categories





**Embedded & Wireless Technologies**



Product Categories of World's Leading Distributors

# Competition. Worldwide.

## Where We Stand. What Makes Us Stand Out.

Rutronik is the third largest distributor in Europe and top-ranked worldwide. But size and sales figures are no indication of what a company does for its customers. Some distributors limit their product range to certain product groups or regions of the world, others choose not to have a team of qualified application engineers who can provide their customers with comprehensive advice on how to best implement a project. Still others exclusively sell their products online or, as public companies, are driven by quarterly results – with dramatic consequences for customers when internal policies change.

## Our Benefits. At a Glance.

- Independent
- Global on-site service
- Comparable prices worldwide
- Unified global infrastructure
- Not driven by quarterly results
- Qualified team of application engineers
- 360-degree product range



## Business Models in Distribution

Global Broadline Distributors				
<b>2017</b>	<b>Arrow Electronics Inc.</b>	<b>Avnet Inc.</b>	<b>Future Electronics Inc.</b>	<b>Rutronik Elektronische Bauelemente GmbH</b>
<b>Public or Private</b>	Public	Public	Private	<b>Private</b>
<b>Headquarters</b>	Centennial, USA	Phoenix, USA	Point Claire, Kanada	<b>Ispingen, Germany</b>
<b>Business Model</b>	Global Broadline	Global Broadline	Global Broadline	<b>Global Broadline</b>

Source: EPSNews – Top Global Distributors, July 2018





## Business Model Differentiation

Online / Catalog / Regional / Hybrid / Limited Product Portfolio / Logistic Provider

<b>Digi-Key Corpor.</b>	<b>Electro- components plc</b>	<b>Mouser Electronics Inc.</b>	<b>Serial System Ltd.</b>	<b>Smith &amp; Associates L.P.</b>	<b>TTI Inc.</b>	<b>WPG Holdings Ltd</b>	<b>WT Micro- electronics Co., Ltd</b>
Private	Public	Public	Public	Private	Public	Public	Public
Thief River Falls, USA	London, UK	Mansfield, USA	Singapore, SG	Houston, USA	Fort Worth, USA	Taipeh, TW	New-Taipeh, TW
Global Online Catalog	Global Online Catalog	Global Online Catalog	Regional Broadline (Asia)	Global Hybrid Distributor/ Logistics Provider	Global Broadline Passive, Semi	Regional Broadline (Asia)	Regional Semi (Asia)

# Selling Solutions. Creating Value.

## Qualified Employees. Qualified Solutions.

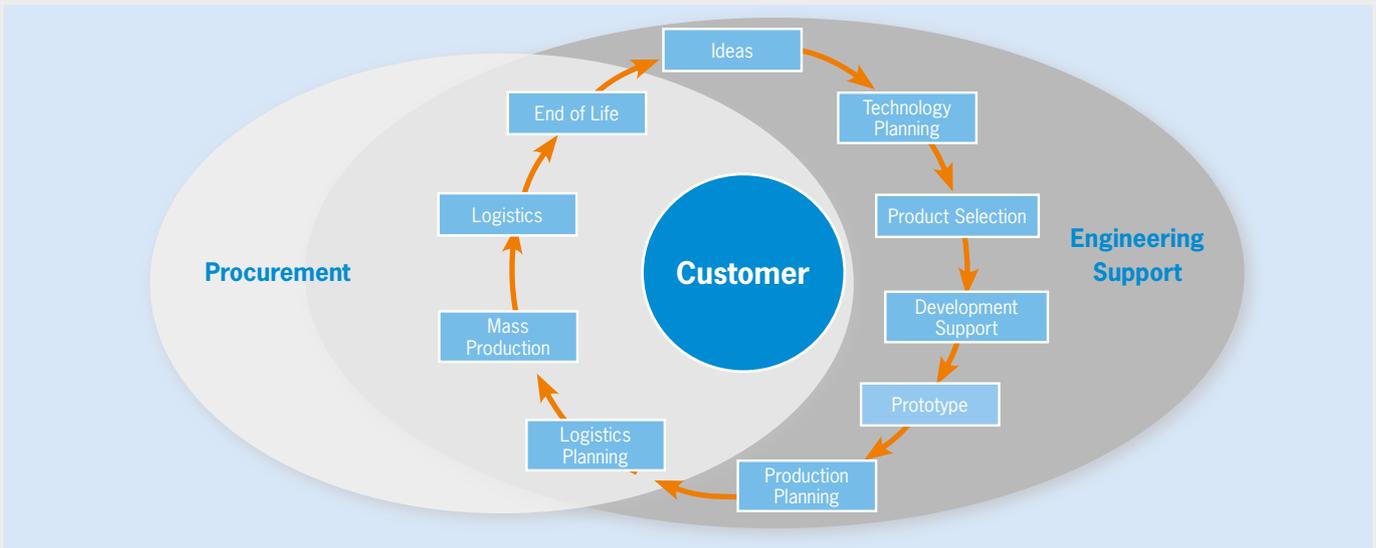
### 360-Degree Support. For You.

Rutronik offers engineering support, procurement services, and comprehensive consulting services from the idea to delivery. Thanks to our balanced range of products and our unified global infrastructure, we combine cutting-edge technologies to produce the best-fitting products and solutions. In addition, we help you to optimize your processes and, as a result, cut costs with a total of 42 value-added services.

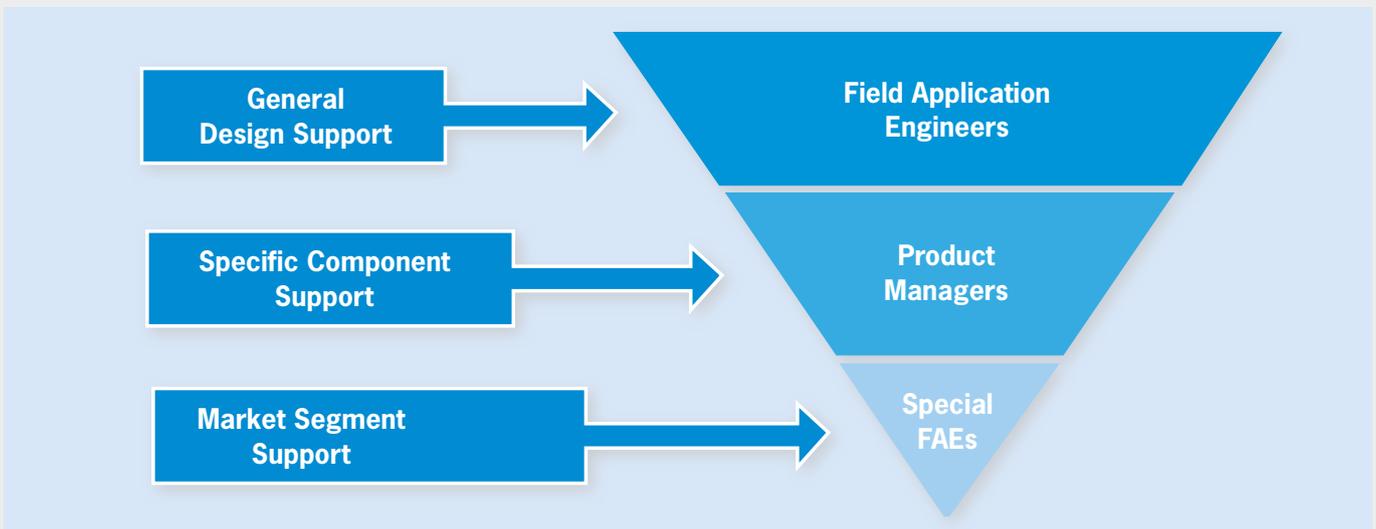
### Your Idea. Our Solution.

Our expert field application engineers support customers right from the start by providing general design support. As soon as the application takes on a more concrete form, Rutronik's highly qualified product managers help with the selection of components and handle the specific component support. They advise the customer on their project's development. For support in the market segment, a team of field application engineers specializing precisely in this segment is available. When the product is ready for mass production, Rutronik supports the customer with its procurement solutions from delivery to the end of the product life cycle.

### Service – Product Life Cycle with Rutronik



### Consulting for Entire Product Range Level of Development



# Our Initiatives. Concentrated Expertise.

A Perfect Combination of Components. For Every Industrial Application.

## Vertical Solutions. For Your Application.

RUTRONIK AUTOMOTIVE brings together entire solutions to build applications for Body & Convenience | Chassis & Safety | eMobility | Drive Train | Connected Car | Consulting.

RUTRONIK Embedded – Acquire bundled hardware, software, and services to build a device and connect it to the internet.

RUTRONIK POWER stands for scalable solutions to convert energy, to switch, to drive, or to connect resistive, capacitive, or inductive loads. RUTRONIK POWER offers dedicated expertise from specially trained FAEs and product marketing managers in combination with state-of-the-art product ranges from top-notch suppliers around the globe.

RUTRONIK SMART gets your offline application connected to the internet. From Edge Intelligence + Security to Embedded Gateways.



**RUTRONIK  
AUTOMOTIVE**

Discover Innovation in Motion  
**AUTOMOTIVE** Products

- Body & Convenience
- Drive Train
- Chassis & Safety
- Connected Car
- eMobility
- Consulting



**RUTRONIK  
POWER**

Design your Ideas  
**POWER** Products

- Industrial
- eMobility
- Home Appliance



**RUTRONIK  
EMBEDDED**

Combine Technologies  
Realize **EMBEDDED** Designs

- Wireless
- Boards & Systems
- Displays
- Storage



**RUTRONIK  
SMART**

Discover the Internet of Things  
Design **SMART** Products

- Sensors
- Wireless
- Security
- Cloud



# Warehouse Logistics. The Benefits of Distribution. Efficiency. With a Plan.

Value-added services (VAS) are services that go beyond the mere sale of components. A total of 70 percent of Rutronik's portfolio consists of "design-in" components, with field application engineers and product managers advising customers in the product development process. In addition, Rutronik offers its customers numerous customizable procurement solutions, logistics services, analysis tools, and much more. We offer 42 of these VAS at our warehouse alone – because logistics is not just picking and packing. Our services range from custom labeling and packaging to export processing, courier and special deliveries, and external storage. We offer all of these services completely free of charge in order to support our customers in the best possible way. This is only possible if our customers refrain from "cherry picking" – in other words, not only purchasing passive components, but also other components from Rutronik.

### Your Benefits. At a Glance.

- Best-fitting products – combine technologies – create solutions
- 42 different value-added services for customized procurement solutions
- Best-in-class technology available
- Our strength is a balanced product range
- Order consolidation for international suppliers and customers and shipping to multiple locations worldwide
- Focus on a common healthy sustainable growth strategy
- Cover all production facilities with a unified allocation of products
- We keep unwanted cost drivers in mind to help your business model remain competitive
- Use our power, strength, and top ranking in the distribution channel network
- Analyze your demand with us and cut costs of ownership



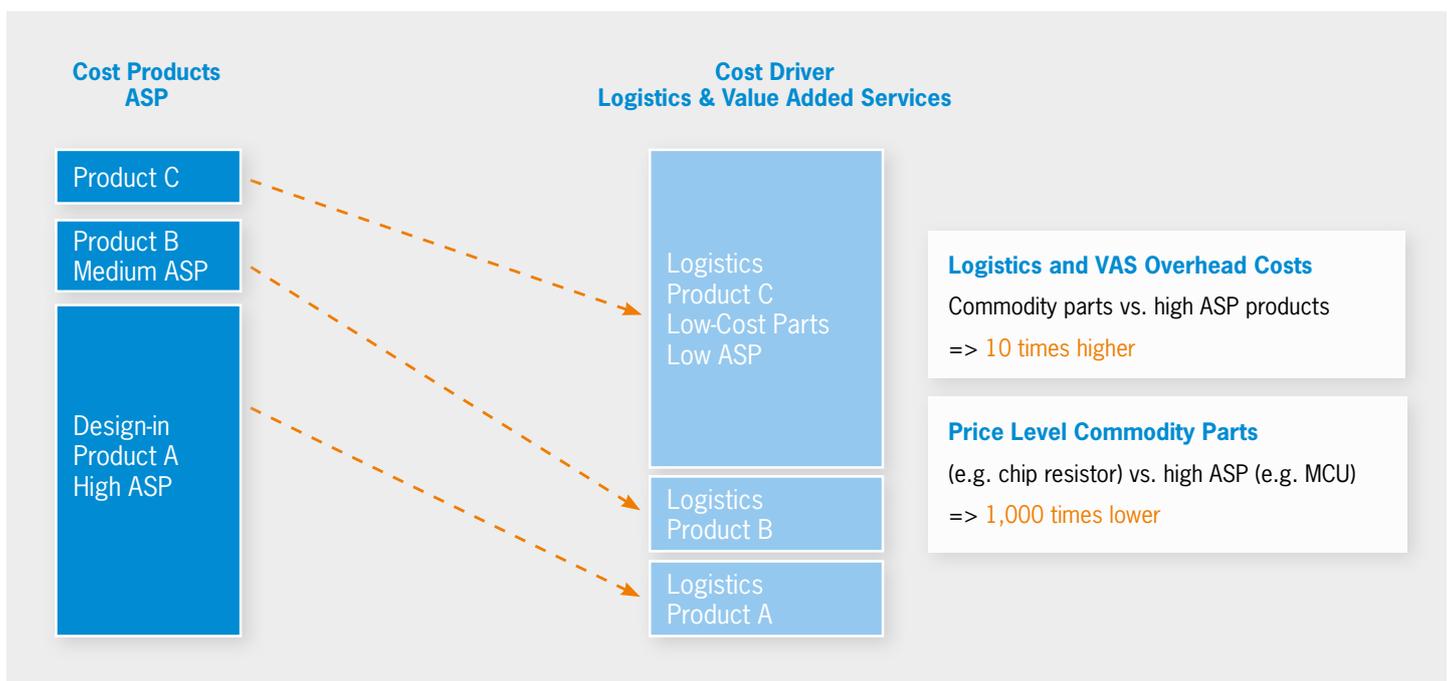


## C Parts at Rutronik. In Focus. Consolidation. With Potential.

### Achieving Synergies by Increasing Volume. A No-Brainer.

The average selling price (ASP) of electronic components varies considerably depending on the product group. When it comes to C parts such as resistors and capacitors, companies face significantly higher warehousing and consulting costs despite a lower selling price. Compared to high-priced components, the costs are ten times higher – at a sales price that is a thousand times lower. Rutronik’s overall cost structure is also built around C parts – but customers can only achieve real savings if they purchase not only C parts, but also other components from our portfolio. Because ultimately, higher volumes create maximum synergies. Work with us if have high volumes.

### Comparison of Relative Total Costs for Design-In Parts vs. Low ASP Components

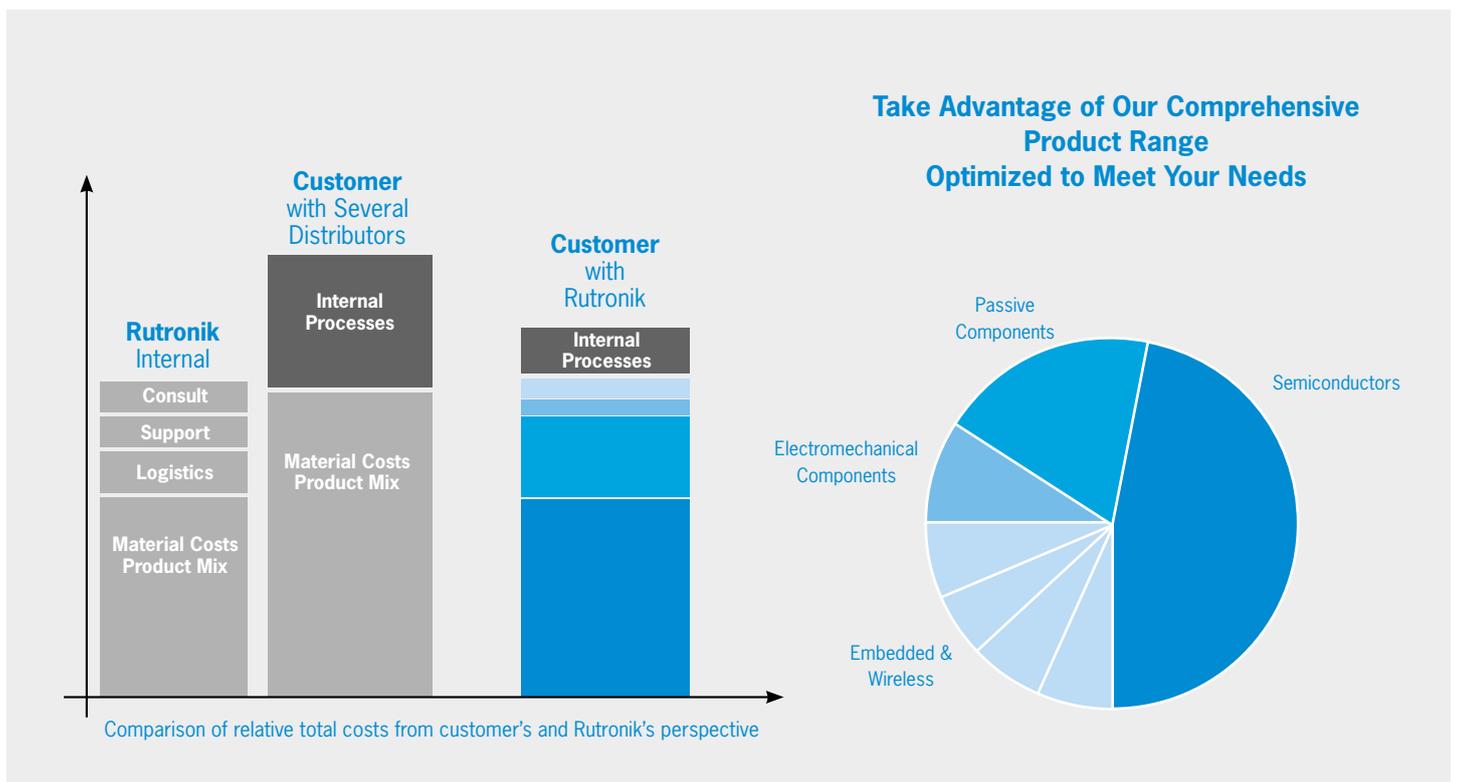




## C Parts at Rutronik. In Focus. Take Advantage of Our Processes. Cut Costs.

### Integrated and Customized. For Your Needs.

With its 360-degree range of products, Rutronik offers all the components needed for a project. Obtaining them from a single source results in real savings for customers. If the required components are obtained from several sources, internal processes are triggered for each individual delivery. This leads to increased administration, storage, and procurement costs. If the customer purchases the components exclusively from Rutronik, they can significantly reduce these costs – while also streamlining internal processes.

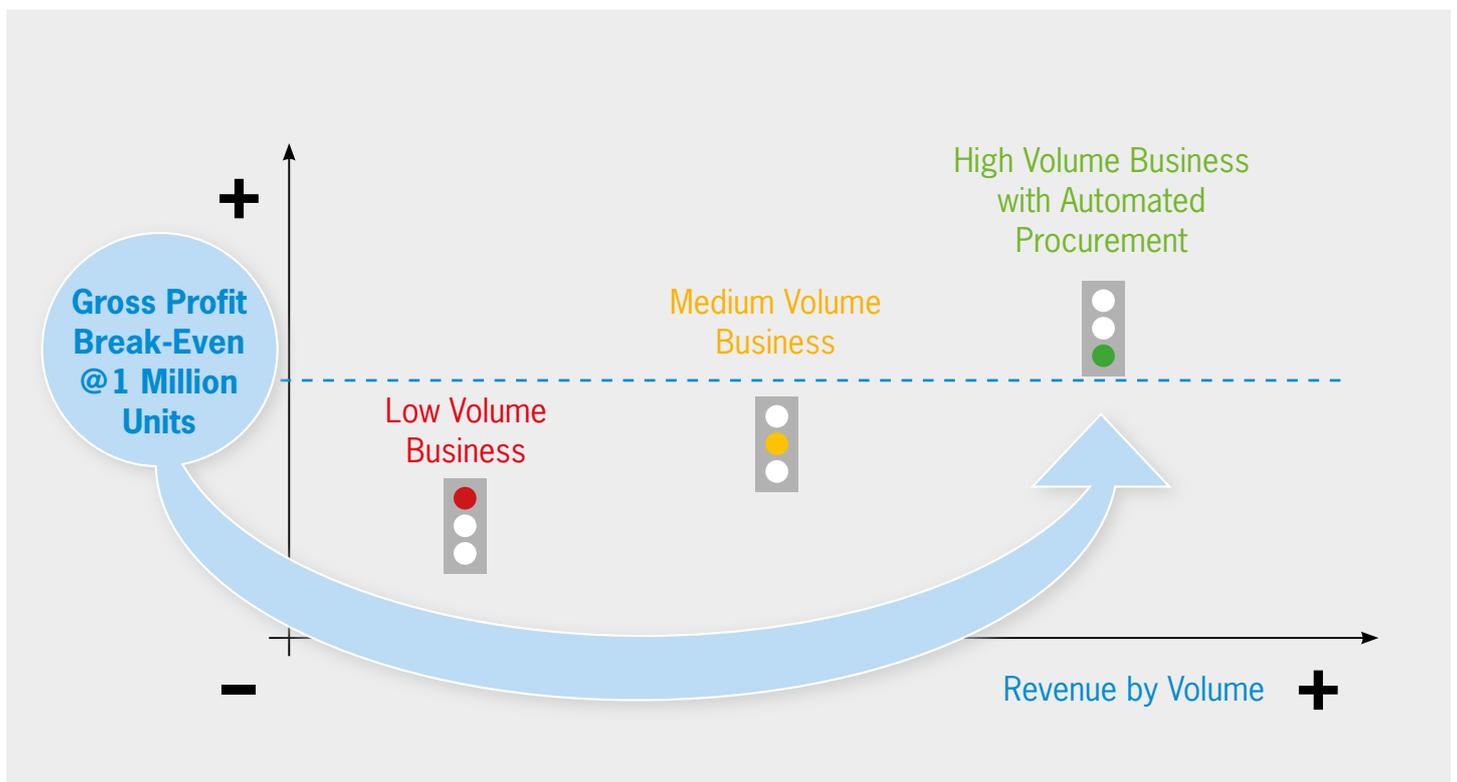




## Break-Even Model with C Parts. At a Glance.

### Typical Break-Even Limit for Resistors and Capacitors. Plain and Simple.

C Parts can be found in every application and are among the basic components that no electronic circuit would function without. At the same time, they also result in high handling, delivery, and storage costs for us. Here's a hypothetical example: Let's say a roll of resistors costs five euros. Its margin is 20 percent, i.e. one euro. The cost of accepting, processing, and fulfilling the order is 100 euros. This means that Rutronik has to sell 100 rolls of resistors per order just to cover its costs. The company generally only covers its costs with orders above a million resistors, i.e. high volumes.





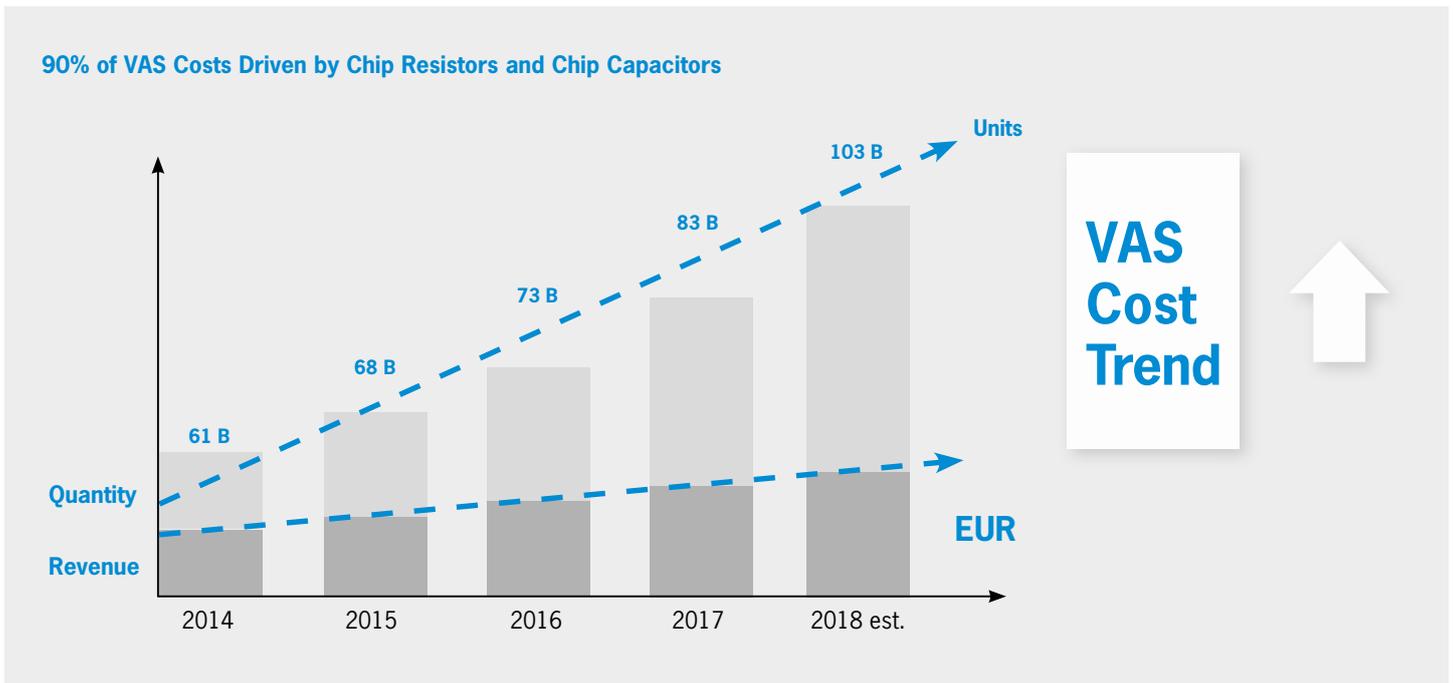
## C Parts at Rutronik. In Focus.

Above-Average Increase in Costs. Because of C Parts.

### Small Components. Big Impact.

90 percent of the costs of value-added services, such as consulting, logistics, and procurement services, are generated by passive components such as resistors and capacitors. Over the past four years, demand for passive components has risen from 61 billion in 2014 to a projected 103 billion in 2018. At the same time, revenue has only slightly increased. This means that the gap between units sold and revenues continues to widen, making value-added services increasingly cost-intensive.

### Cost of Ownership Trend by Units Shipped





## Increasing Demand. Complimentary Service.

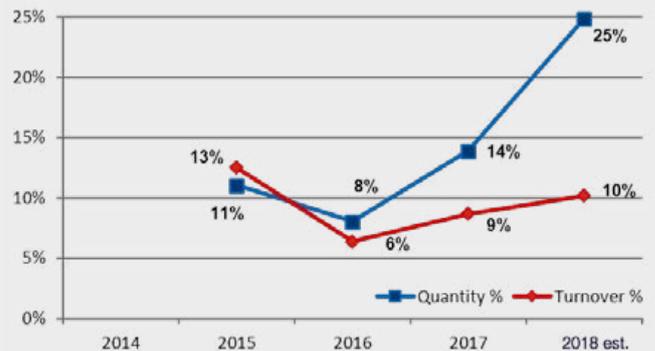
### Demand and Revenue. Two Different Worlds.

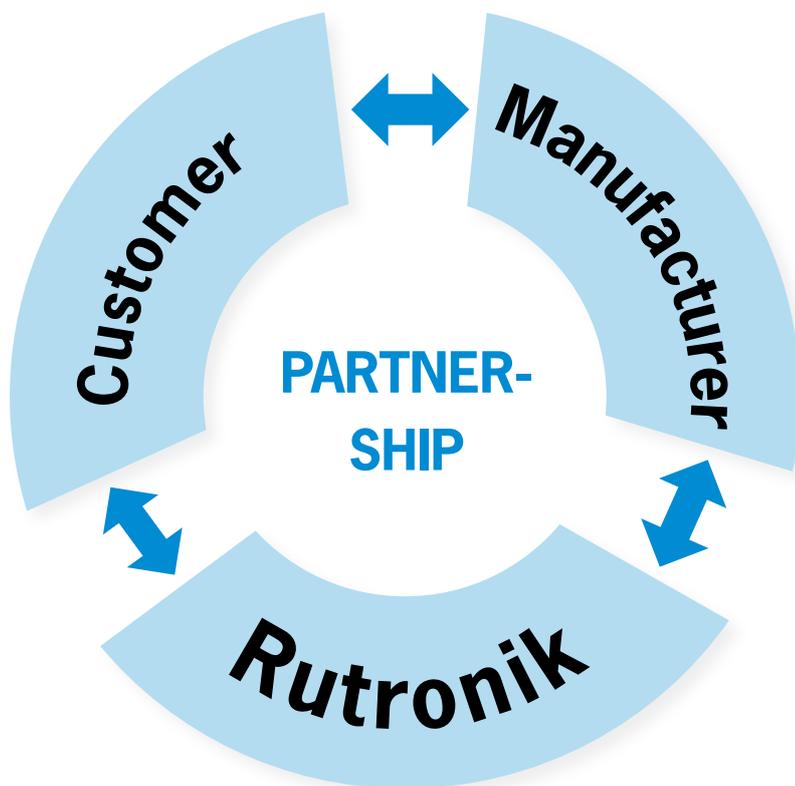
The costs for warehousing and logistics increase disproportionately compared to revenue, particularly because of C parts. From 2017 to 2018, the number of passive components sold will rise from 82.8 billion to an estimated 103.4 billion – an increase of 25 percent. Revenue, on the other hand, will increase by only ten percent. At the same time, Rutronik also offers comprehensive services for C parts – free of charge.

Number of Units Shipped in Billions and Percentage Increase ASP



Increase in Quantity and Revenue in %





## Rutronik and Manufacturer. Together for You. Connected Partnership. Everyone Benefits.

As a distributor, Rutronik is well connected throughout the entire supply chain, both with manufacturers of electronic components and with customers and design partners, suppliers, and OEMs. Our network benefits our partners in many ways, from joint marketing activities to communications in compliance with data protection regulations throughout the entire value chain.

### Benefits for Customers. At a Glance.

- Trade shows and conferences
- Trainings and seminars
- In-market product management
- Front-line technical support
- Worldwide pricing, support, and shipments
- Continuous and sustainable supply chain due to long-term backlog management
- Second level and post-sales technical support
- Transfer of knowledge via collaborative projects with leading universities including bachelor's and master's thesis projects

### Benefits for Manufacturers. At a Glance.

- Demand generation
- Channel worldwide key account management
- End-customer marketing and lead generation programs
- Conference and exhibition services
- Co-op fund programs and promotion for vertical markets
- Long term and sustainable partnerships for over 40 years

### Well Connected. Together.

- Networking within the supply chain
- Logistics – drop shipment to ultimate worldwide customer
- Worldwide visibility in demand and fast response
- NDA-based communication throughout the entire value chain with technical and commercial decision-makers
- Transparency in communications





## POWERED BY THE SUN

Rutronik generates sustainable energy via solar power.

■ Installed capacity

1,020 kWp

■ Total output

963,221 kWh/year

■ Carbon emissions saved

674 t/year

## Green Energy. A Clear Conscience. Environmentally Friendly. For Our Future.

### Driving Innovation. Promoting Research.

As an owner-operated family business, the environment is extremely important to us – at the same time, protecting the environment also offers tangible benefits from a business standpoint and can help cut costs. This is why Rutronik works with universities, among others partners, to develop even more efficient, environmentally friendly technologies. We already rely entirely on green electricity today, and have equipped all our offices worldwide with LED lighting technology.

### Certified Sustainability.

Our Integrated Management System (IMS) encompasses quality, information security, environmental protection, and occupational safety aspects. It is certified annually in accordance with the international ISO 9001, ISO 27001, ISO 14001, and OHSAS18001 standards. In addition, our certified ESD protection measures and Dry Pack packaging system ensure that components are not damaged. As part of its environmental management system, Rutronik both increases its own sustainability and supports its customers in achieving their environmental goals.

### Certified Standards of Quality.

Only the highest standards are good enough for Rutronik. This is why we undergo a continuous certification process to meet the standards of applications in demanding fields such as Automotive and Industry 4.0. The ISO 9001 (quality management), ISO27001 (information security), ISO 14001 (environmental management), OHSAS 18001 (health and safety management), as well as the ESD and Dry Pack certifications confirm that we meet the high standards we set for ourselves.



### Certifications

- Quality management system
- Information security management system
- Environmental management system
- Occupational safety system
- Proof of ESD conformity
- Dry Pack packaging system



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