Company Presentation

Avnet Global I Avnet EMEA I Avnet Silica

15/02/2018

∧VNET® SILICA

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Avnet Inc. Global

Guiding today's ideas into tomorrow's technology.

About Avnet

Fast Facts

- – Headquartered in Phoenix, AZ
- – Founded in 1921
- – AVT listed on the NYSE in 1960
- – 600+ suppliers
- – 110,000+ customers
- – 100 acquisitions announced or closed since FY91
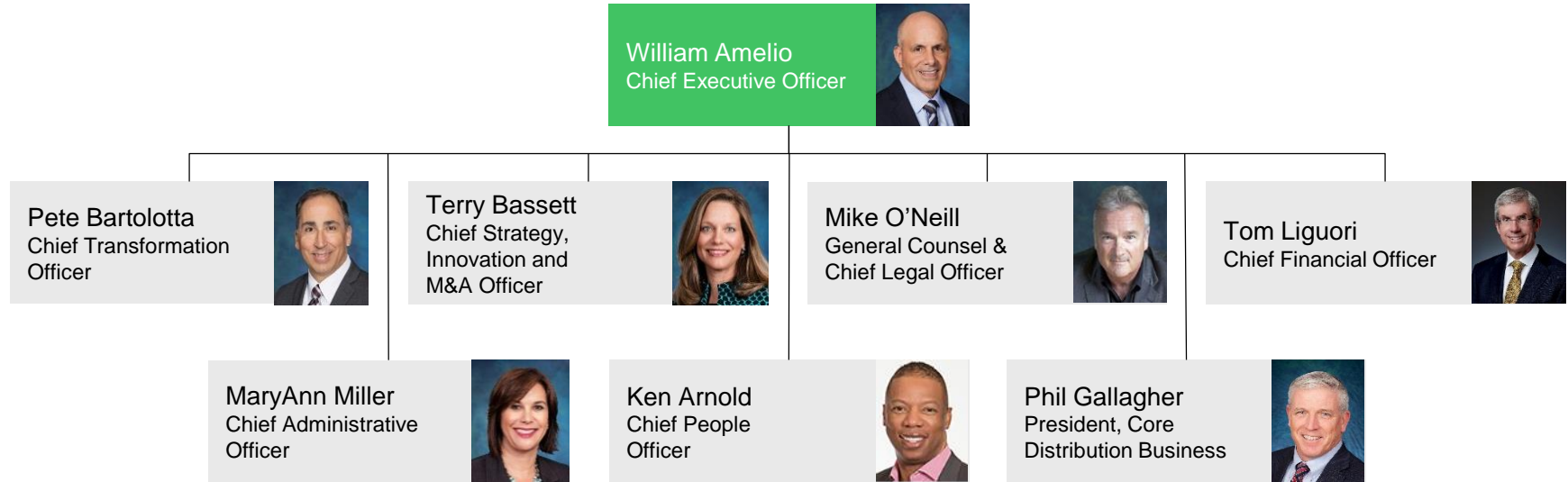- – 15,000+ employees worldwide

Awards

- – Named to Fortune's Most Admired list for technology distribution – 2007-2017
- – Top Business Technology Innovator on the 2016 InformationWeek Elite 100
- – Named a World's Most Ethical Company by Ethisphere Institute 2014-2017
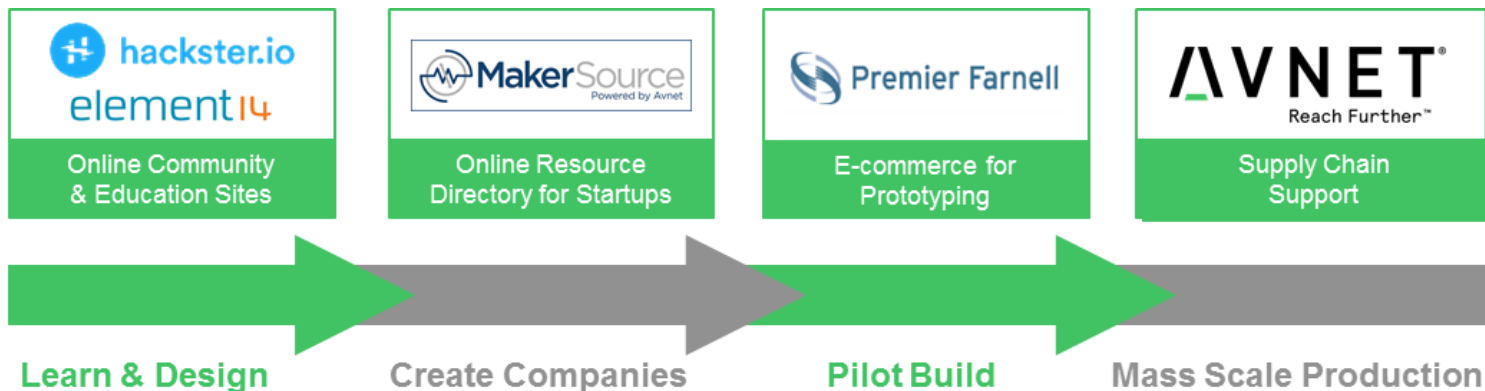
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Unprecedented Change at Avnet

- CEO and AEB transition
- Regional President transitions
- Technology Solutions divestment
- Acquisition of Premier Farnell
- Launch of transformation project
- New "one-company" organizational structure
- Acquisition of Hackster.io
- New Avnet brand

Avnet Executive Board (AEB)

William Amelio
Chief Executive Officer

Pete Bartolotta
Chief Transformation
Officer

Terry Bassett
Chief Strategy,
Innovation and
M&A Officer

Mike O'Neill
General Counsel &
Chief Legal Officer

Tom Liguori
Chief Financial Officer

MaryAnn Miller
Chief Administrative
Officer

Ken Arnold
Chief People
Officer

Phil Gallagher
President, Core
Distribution Business

Connected ecosystem with distinct brands

- Hackster.io and Element14 significantly expand engineering community reach
- Premier Farnell broadens portfolio of design tools and technical solutions
- Connected ecosystem offers product time-to-market advantage through seamless services at each transition

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Services capabilities

FY16

99 Billion
Units Shipped

2.6 Million
Part Numbers Stocked

6.7 Million
Orders Processed

407,000
Systems Integrated

254 Million
Devices Programmed

/design\

/supply\

/make\

/deliver\

- Online communities
- Field application engineers
- Education and technical seminars
- Device selection to full system solutions

- Supply chain design
- Ecommerce and direct sales
- Financing options
- Product marketing services

- Build, assemble and test
- Product/system integration and assembly
- Prototype to volume production
- Regulatory quality and trade compliance

- Core distribution services
- Logistics and transportation management
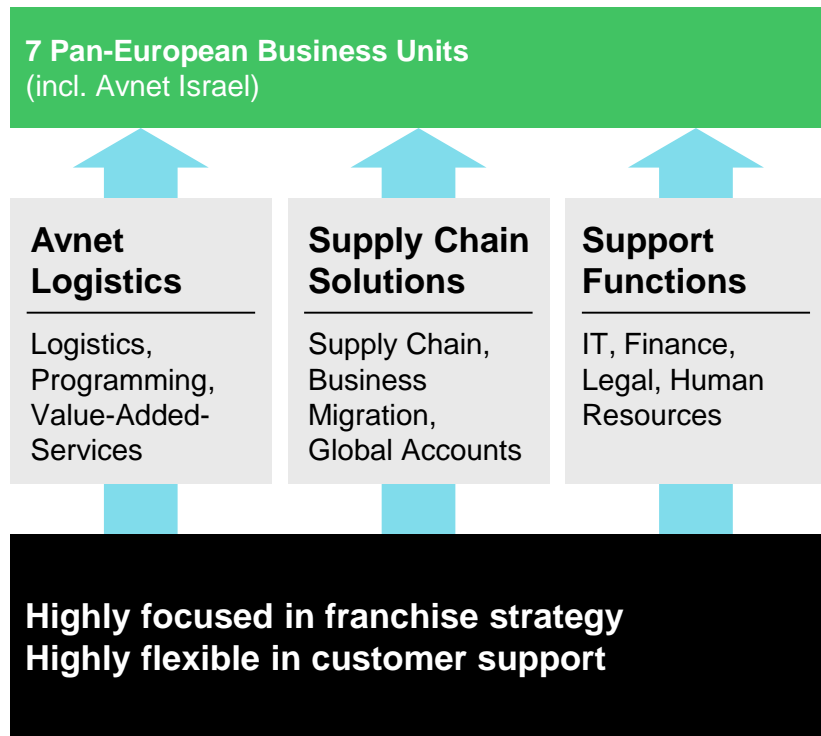- Routes to market
- Asset disposition

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Avnet EMEA

Avnet EMEA – Company Snapshot

FAST FACTS

- 300+ Franchises

- 4.59 Billion € Company

- 30,000+ Customers

- 46% Semi Market share, 12% IP&E Market share

- Leading Design Distributor in EMEA

- 4,600 Employees

- 800+ Engineers

- 1,300 Account Manager & Internal Sales
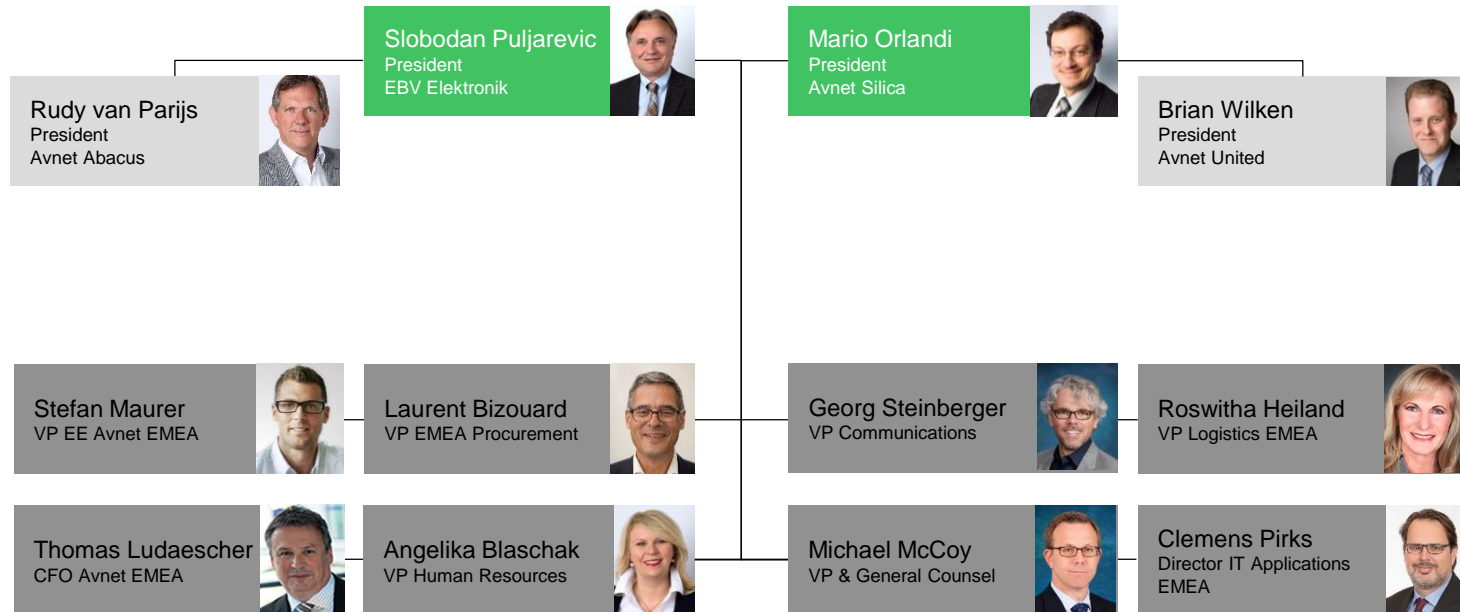
Avnet EMEA –
The Speedboat Model

7 Pan-European Business Units
(incl. Avnet Israel)

Avnet Logistics	**Supply Chain Solutions**	**Support Functions**
Logistics, Programming, Value-Added-Services	Supply Chain, Business Migration, Global Accounts	IT, Finance, Legal, Human Resources

Highly focused in franchise strategy
Highly flexible in customer support

/\VNET®
Reach Further™

Avnet Logistics

Central Asset Management / Enterprise Effectiveness

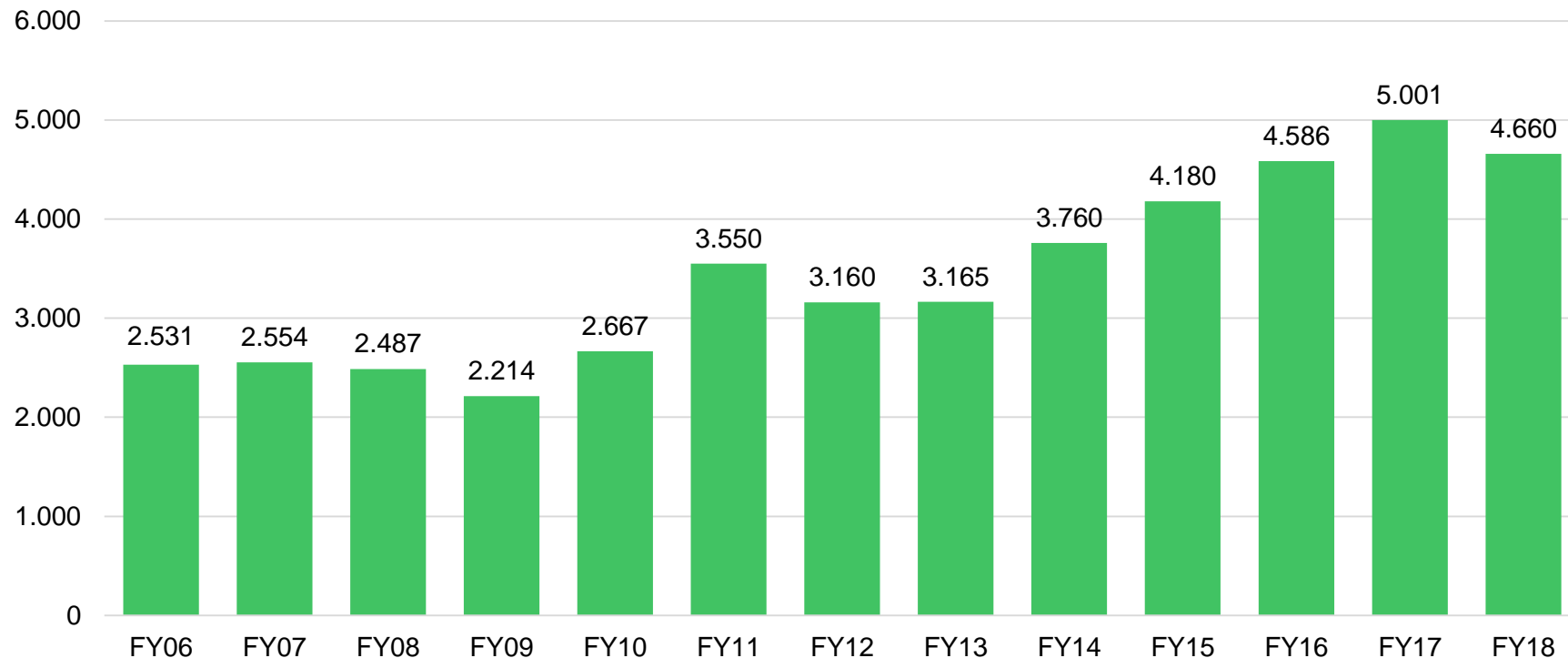| Avnet United	Global Accts/ Fulfill-ment
EBV Elektronik	An Avnet Company		Semiconductors
/\VNET® SILICA	
/\VNET® ABACUS	IP & E
/INTEGRATEDSOLUTION	Embedded
msc technologies an Avnet Company	

Avnet EMEA Key Facts

- Biggest Location Poing (~1,000 employees)

- Highly-skilled engineers make up 20% of the workforce

- No. 1 industrial distributor in EMEA

- 30,000 customers across 30 countries

- Over 300 world-class component suppliers

Avnet EMEA Executive Management

Slobodan Puljarevic
President
EBV Elektronik

Mario Orlandi
President
Avnet Silica

Rudy van Parijs
President
Avnet Abacus

Brian Wilken
President
Avnet United

Stefan Maurer
VP EE Avnet EMEA

Laurent Bizouard
VP EMEA Procurement

Georg Steinberger
VP Communications

Roswitha Heiland
VP Logistics EMEA

Thomas Ludaescher
CFO Avnet EMEA

Angelika Blaschak
VP Human Resources

Michael McCoy
VP & General Counsel

Clemens Pirks
Director IT Applications
EMEA

Avnet EMEA Revenue History (M€)

Bar chart of Avnet EMEA Revenue History (M€):

Fiscal Year	Revenue (M€)
FY06	2.531
FY07	2.554
FY08	2.487
FY09	2.214
FY10	2.667
FY11	3.550
FY12	3.160
FY13	3.165
FY14	3.760
FY15	4.180
FY16	4.586
FY17	5.001
FY18	4.660

Strategic Goal: Become #1 in Electronic Component Distribution

- In all Customer Segments
- In all Geographies
- In all Technologies
- With all Suppliers
- In Customer Engagement
- In Design Support & Solutions
- In Supply Chain Solutions
- As preferred Employer

Avnet EMEA Key Differentiators

– We are pan-European

– Our sales force is empowered

– Design products: our people have a higher technical and product expertise to advise customers and win designs

– Commodities: we are leveraging our purchasing power and expertise

– We have a better stock profile on the lines we distribute because we are more focused

– We offer better share of mind to our suppliers

Avnet Silica

Avnet, Inc. – Mission and Vision

Our Mission

– Avnet Silica is the smart connection between our Customers and our Suppliers.

– We simplify complexity by providing creative solutions, technologies and logistics via our passionate, energized and empowered team.

Our Vision

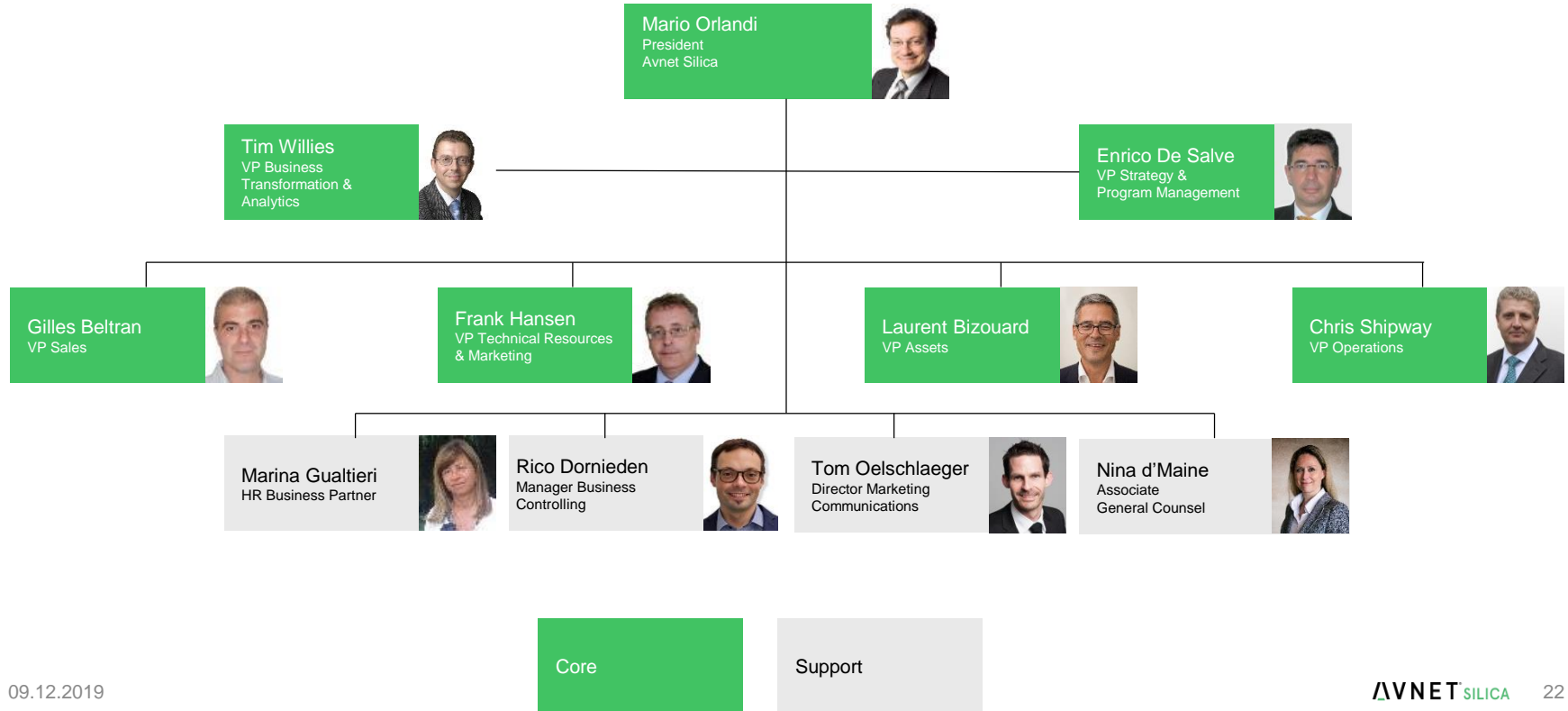– Our Vision is to make innovation simple.

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Avnet Silica – Fast Facts

- Sales of 1.7 Billion Euro
- 60+ Supplier partners
- 15.000+ Customers
- ~ 18% Semiconductor Market Share

- Leading Design-in Distributor in EMEA
- 940 Employees
- 200+ FAEs and Technical Specialists
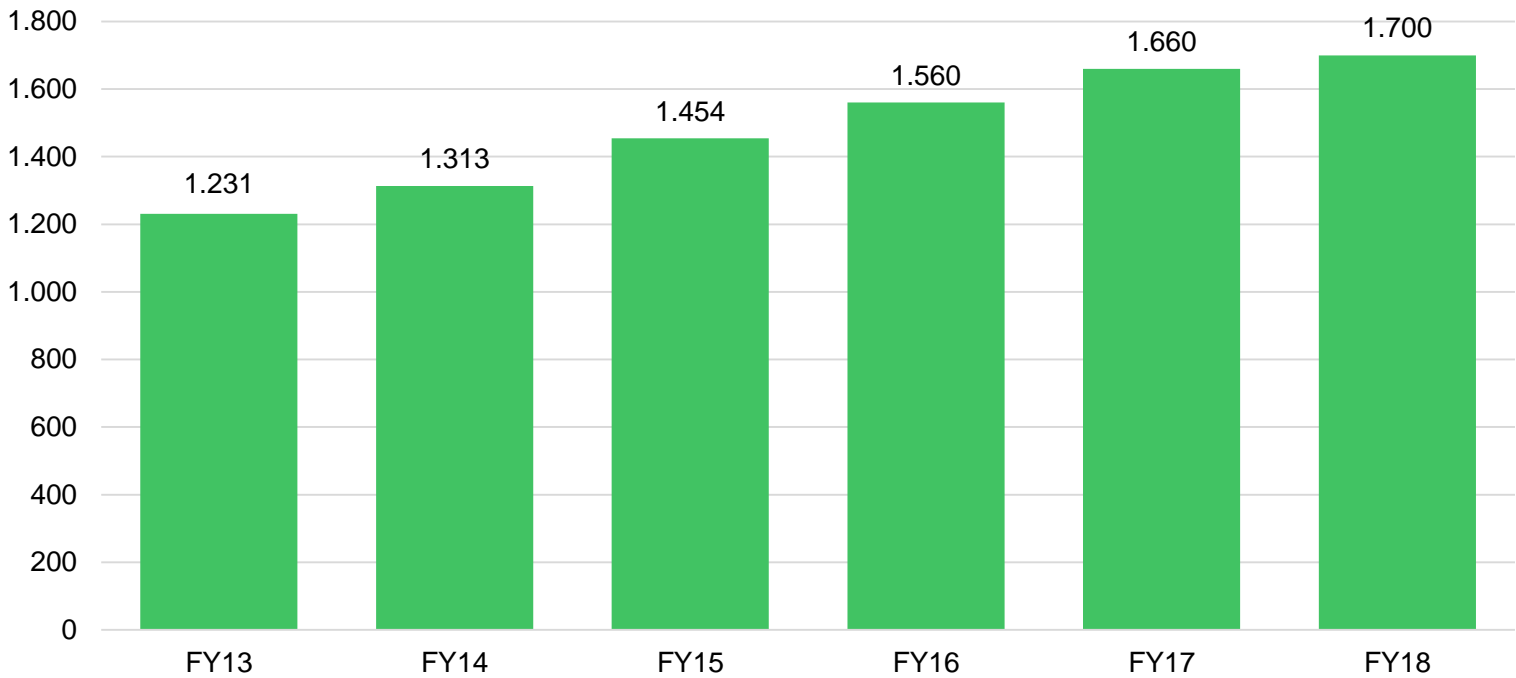- 46 Sales offices in 22 countries across EMEA
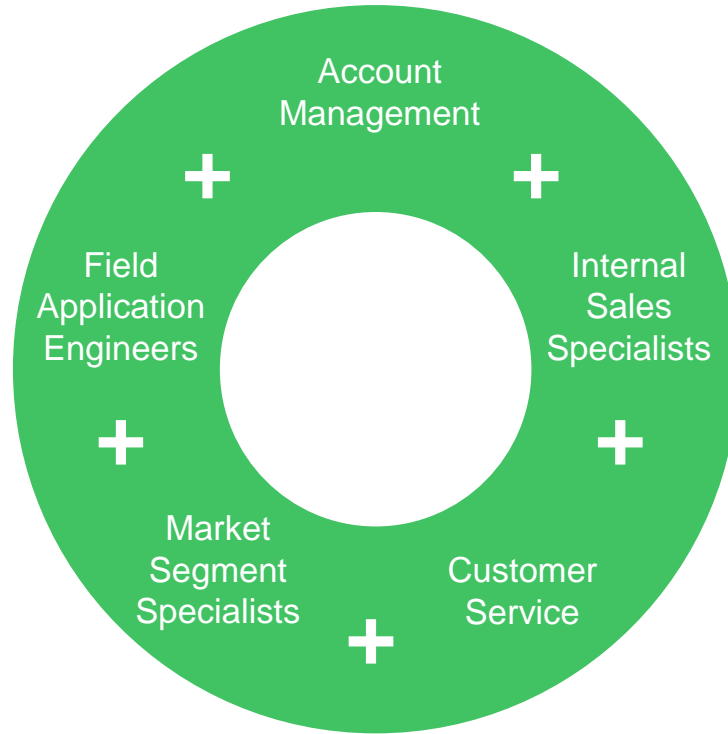
Our Value Proposition

Avnet Silica provides the best technologies, services and ideas to high-tech companies across Europe.

We listen to our customers' challenges and turn them into competitive opportunities. Our people are engaged customer advocates. They act fast and ensure a seamless execution.

The result is the best solution all the way through – From design to delivery – That makes customers stay ahead.

Avnet Silica Executive Team

Mario Orlandi
President
Avnet Silica

Tim Willies
VP Business
Transformation &
Analytics

Enrico De Salve
VP Strategy &
Program Management

Gilles Beltran
VP Sales

Frank Hansen
VP Technical Resources
& Marketing

Laurent Bizouard
VP Assets

Chris Shipway
VP Operations

Marina Gualtieri
HR Business Partner

Rico Dornieden
Manager Business
Controlling

Tom Oelschlaeger
Director Marketing
Communications

Nina d'Maine
Associate
General Counsel

Core

Support

Avnet Silica Revenue Evolution (M€)

	FY13	FY14	FY15	FY16	FY17	FY18
Revenue (M€)	1.231	1.313	1.454	1.560	1.660	1.700

Our Support Structure

Portfolio

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Avnet Silica Technical Support

More than 180 Field Application Engineers provide design-in support and technical solutions.

Generalist FAE's
PLD Experts
Digital & Analog FAE's
Power Experts

FAE's strive for offering complete solutions, assembling technologies from our different franchise partners

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INTERNET OF THINGS

SECURITY

EMBEDDED VISION

DATA COMM

AEROSPACE & DEFENCE

Market/Application Focus
Our technical teams understand end markets and provide support and solutions for high-growth verticals and special technologies.

AUTOMOTIVE

LIGHTING

BUY ONLINE

Access our inventory with more than 1.000.000 parts from our European warehouses

SEARCH & EVALUATE

Comprehensive search functionality, parametric search, alternate part suggestion, compare function.

MANAGE YOUR ACCOUNT

Manage user and access rights, track your orders online or view your online order history

Digital Services (www.avnet-silica.com)

Supply Chain Solutions

Supply Chain Solutions – The Challenge

With today's fast-paced, globalised and constantly changing business environment, supply chain challenges continue to grow and increase in complexity.

Key Challenges:

- Total Cost of Ownership

- Flexibility and Agility

- Reliability

- Lean Processes

- Risk Management

Supply Chain – Our Solutions

- Tailored supply chain solutions instead of one-size-fits-all solutions

- We work closely with customers right from the outset to understand supply chain challenges and goals, then build a solution that fits their requirements.

- We provide a wealth of tried and tested tools and processes which can help optimise the supply chain, reduce risk and increase efficiency

- State of the art warehousing and product transformation capabilities with Avnet Logistics Services

- Information management that delivers better connectivity and transparency in the supply chain

Overview Supply Chain Solutions

- Supply Chain consulting
- Labelling and packaging
- Consolidated deliveries
- Electronic data interchange
- Buffer stock management
- Flexibility-model implementation
- Replenishment services – Kanban
- Just-In-Time (JIT) Services / lead-time reduction services

- Inventory management
- Logistics optimisation
- Process mapping
- POURS (replenishment plus forecasting)
- Economic line value tool (cost analysis tool for customers and internal)
- Pareto – C-Parts replenishment & order automation tool
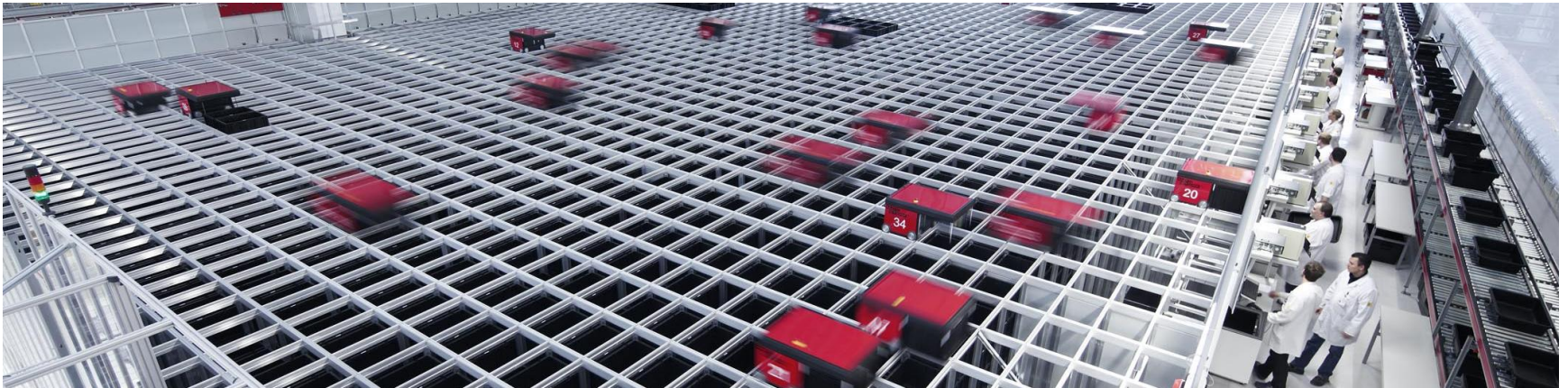
Avnet Logistics

Avnet Logistics

– Located in Poing/Munich

– Newest technology to increase efficiency

– Technologies such as the Autostore and Sequencer optimise order fulfillment handling

	Poing 1 (Old Warehouse)	Poing 2 (New Warehouse)
Total surface area	27.150	31.750
Volume pallet storage space	44.000m³	80.000m³
Storage capacity pallet shelves	14.000 pallet spaces	35.000 pallet spaces
Paper consumption picking process	28t paper per year	0t paper per year
Length of conveyor belts	60m	5km

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Autostore

- Number of Locations 45,000
- Number of Autostore Robots 37 and 1,25 Mio. picks/year
- High Performance Picking
- High Redundancy
- Easy to Expand

Inbound

- Inbound volume FY14 approx. 5,600 to

- Number of Inbound lines per day
  > 4,500 lines

- Hot PO Process (Express)

- End to end Traceability

- Quality Inspections and RMA Handling

Outbound

– High Modularity

– Value Added Service Focus

– Number of Parcels per day approx. 5,500

– Number of lines per day approx. 11,000

– Shipped value per day approx. 13.8 Mio.

Thank you!