Blue Laser Goes to Market...

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Agenda

- Ingram Micro
- Two Markets for Blue Laser
  - Information Technology
  - Consumer Electronics
- Which Customer Segments to Invest In?
Ingram Micro – A Leader in IT

- The world’s largest wholesale provider of technology products and services
- Serving customers in more than 100 countries
- 48 distribution centers and operations in 35 countries
- 11,300 associates worldwide
- Annual revenues for 2003 - $22.6 billion
- Number 81 on the Fortune 500

25 Years of Experience in IT Distribution
A Vital Link in the IT Value Chain

1,400 Vendors

165,000 Resellers

Marketing
Sales
Financing
Logistics
Configuration
Tech Support

Fortune 1000
Small/Medium-Sized Businesses
Retail Customer

The Average Technology Solution:
40 Products, 4 Different Technologies*

*CRN, March 3, 2003
2004: Driving Profitable Growth

Expand the Core
- Grow greater than overall IT market
- Improve customer share of wallet
- Higher-margin, higher-growth products
- Enhance services offering

Adjacent Markets
- AIDC/POS
- Consumer Electronics
- Components

Geographic Expansion

Maximizing Growth and Profitability
For Our Vendor and Reseller Customers
### IT Value Chain

- **$250+ Billion Market**
  - 54% End User Direct
  - 26% One-Tier
  - 20% Two-Tier
- **Customer Segments**
  - Direct Marketer
  - Corporate Reseller
  - E-tail
  - Retail
  - VAR’s

### CE Value Chain

- **$100+ Billion Market**
  - 75% One-Tier
  - 10% Two-Tier
  - 15% Buying Group
- **Customer Segments**
  - Large Retailers
  - E-tail
  - Regional Retailers
  - Custom Installers

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*IT Value Chain Size: Composite of Internal Data*

*CE Value Chain Size: Consumer Electronics Association (CEA)*
We Provide Solutions to Build Markets for our Partners

Customer Community & Service Delivery

Technology & Category Campaigns

Vertical Focus

Target Solutions

Networking
Security
Mobility
Peripherals
S&A
Linux
Government/Education
Healthcare
Financial
Retail
Manufacturing
IP Communications
Doc Management
IP Surveillance
AIDC/POS
Digital Home/Signage

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Geoffrey Moore’s “Chasm” Model

Will Blue-Laser make it across the Tech. Chasm?
Which Customer Segment to Invest In?

Customer Segments:
- IT Reseller
- CE Reseller

- Early Adopters
- Early Majority
- Late Majority
- Laggards

Product Acceptance:

Value Added Resellers:
- Direct Marketer
- IT Retail

Custom Installer:
- CE Retail
- Independent CE Retailer

Blue-Laser is in the Early Adopter Stage.
The best way to get technology from the people who make it to the people who use it.