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THE WORLDWIDE INDUSTRIAL ELECTRONICS ASSEMBLY MARKET

2012 Edition

An In-Depth Study of Worldwide Industrial Electronic Assembly by Product Market, 2011-2016

Report Highlights

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The Worldwide Industrial Electronics Assembly Market - 2012 Edition

Synopsis

The worldwide industrial electronics assembly market is one of the most interesting and profitable segments for EMS companies to engage in. While growth of the total available industrial market is modest (between 5-6% annually), the growth of the EMS services sector is more than double depending on the product. Some of the most promising opportunities can be found in the Test & Measurement and Process Control sectors where advanced electronics are making a huge impact in efficiency and cost reduction. Both of these segments rely on semiconductor technology to improve performance, accuracy and payback for OEM product development. As a result, EMS companies are helping OEM suppliers to reduce cost, efficiency and time to market. As with most product markets, electronics innovation is key to overall market growth.

New Venture Research (NVR) has followed the electronics manufacturing industry for over 20 years and is pleased to now offer this special study—***The Worldwide Industrial Electronics Assembly Market, 2012 Edition***—the most comprehensive and in-depth market research report available on this industry. In 2011, EMS suppliers achieved only a total available market (TAM) penetration rate of 22.6%, however, by 2016 the penetration rate is projected to reach 26.9% - an increase of more than $10 billion in revenue worldwide. This represents a compounded annual growth rate of 8.2% - nearly double that of the OEM annual market growth rate.

The report begins with an examination of the various kinds of electronic assembly products in the industrial sector. Certain assemblies are very electronics-intensive (that is, they are suitable to semiconductor innovation). Examples include programmable electronics controllers (PLCs) which dominate the process control industrial sector, and electrical inverters found in clean energy technology. Other industrial products, such as HVAC, laundry and LEDs are mixed in terms of outsourcing opportunity due to the high percentage of mechanical assembly labor involved.

A total of 29 industrial products across four product segments are examined for electronics assembly content, in terms of cost of goods sold (COGS) and outsourcing opportunity. The result is a mixed summary of high growth versus high volume manufacturing opportunities that are likely candidates for outsourcing (other products are better left to the OEM to address and manufacture). As a result, electronics-intensive products such as test equipment will experience the highest revenue growth over the next five years, whereas there will be modest growth for most electro-mechanical industrial product assemblies.

All 29 industrial electronics product opportunity segments are examined for electronics/semiconductor content and manufacturing challenges, as well as potential partnerships with the leading OEM suppliers. In general, most Western OEM companies are open to subcontracting, whereas many Eastern OEMs prefer to maintain in-house manufacturing service capabilities–mostly for reasons of revenue capture as opposed to efficiency. The result will be a contrast in the dynamics between the different geographic regions with regard to manufacturing fulfillment and distribution. These conflicting forces will disrupt the industrial economic picture over the next five years, resulting in displacements in leadership and innovation.

All of these products and markets are analyzed from 2011–2016 in terms of OEM revenue and EMS subcontracting potential, in addition to production by region. An Excel spreadsheet allows for easy understanding and manipulation of the production data and ranking of OEM leadership.

The Worldwide Industrial Electronics Assembly Market, 2012 Edition is the product of hundreds of hours of intensive research. The report sells for $3495, with extra single-user licenses at $250 (corporate licensing is an additional $1000). This report is only available in PDF format and is delivered by email. An Excel spreadsheet of all tables may also be obtained for an additional $500.

About the Author

Randall Sherman is the President/CEO and principal analyst of New Venture Research Corp., a technology market research and business consulting firm focused on the EMS and OEM electronics manufacturing industries. Mr. Sherman has more than 25 years' experience in technology and business research. He has held senior positions at various market research firms, including Creative Strategies, Frost and Sullivan, and BIS Strategic Decisions. He began his career as a telecom network design engineer. He holds an undergraduate degree in Astrophysics from the University of Colorado, a MSEE from the University of Colorado and an MBA from the Edinburgh School of Business.

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Published March 2012, 239 Pages

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