

Now Available!

THE WORLDWIDE INDUSTRIAL ELECTRONICS ASSEMBLY MARKET

2012 Edition

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

Report Highlights

- **Worldwide Industrial Electronics Assembly Analysis, 2011**
 - ◆ **29 Industrial Product Segments**
 - ◆ **OEM/EMS Analysis by Product**
 - ◆ **OEM Product Analysis by Region**
 - ◆ **100 Leading OEM Suppliers by Market Share**

- **Worldwide OEM/EMS Market Forecast, 2011–2016**
 - ◆ **29 Industrial Product Revenue Forecasts**
 - ◆ **OEM/EMS Production Revenue Forecast**
 - ◆ **Market Growth Rate Comparison**

- **In-Depth Company Profiles (100 leading Industrial OEMs)**
 - ◆ **Revenue by Product**
 - ◆ **Manufacturing Revenue by Product**
 - ◆ **Examples/Images of Leading Products**

New Venture Research Corp.

Zwaluwstaartweg 13

5641GW Eindhoven, THE NETHERLANDS

A Technology Market Research Company

Tel: 31-06 4100 9362

www.alerta-intelligence.com

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.

The Worldwide Industrial Electronics Assembly Market - 2012 Edition

Abbreviated Table of Contents

Chapter 1: Introduction

Objectives Organization
Methodology

Chapter 2: Executive Summary

Industrial Products Market
Process Control
Test & Measurement
Other Industrial Products
Clean Energy
Industrial Products Market Forecast

Chapter 3: Industrial Product Assembly

Process Control

- Automation/Programmable Logic
- Construction/Agricultural/Mining
- Electric Motors
- Electrical Distribution/Smart Grid
- Elevator Systems
- Environmental Management
- Fluid Control/Hydraulics
- Marine/Waste Water
- Oil/Gas
- Power Supplies
- Robotics
- Smart Meters
- UPS/Batteries

Test & Measurement

- Inspection
- Instruments/Metrology
- Semiconductor
- Test Equipment

Other Industrial

- ATM/Gaming/Vending
- HVAC
- Laundry/Home Appliances
- Lighting/LEDs
- Security/Safety
- Tools
- Handling/Specialty/Other

Clean Energy

- Fuel Cells
- Inverters
- Solar PV
- Tidal/Other
- Wind Energy

Chapter 4: Industry Structure, 2011

Total Available Market - 2011
(by all 29 products listed above)
Process Control
Test & Measurement
Other Industrial
Clean Energy
OEM/EMS Markets by Product/Segment
OEM/EMS Production Revenue by Region/Product

Chapter 5: Industry Forecasts, 2011-2016

Total Available Market by Product Segment - 2011-2016
(by all 29 products listed above)
Process Control
Test & Measurement
Other Industrial
Clean Energy
OEM/EMS Markets Forecast by Product/Segment

Chapter 6: Top 100 Company Profiles

ABB	Gamesa	Parker Hannifin
Abengoa	GE Industrial	Pentair
Acciona	Gemalto	PerkinElmer
Advantest	General Dynamics	Philips Lumileds
Agilent	Global Cash Access	Power-One
ALSTOM	Haier	Q-Cells
Applied	Halliburton	Republic Services
AREVA	Hitachi	Robert Bosch
ASML	Honeywell	Rockwell Automation
AIXTRON	IGT	Rohde & Schwartz
Baldor Electric	Ingersoll Rand	Saft
Bechtel	Invensys	Samsung
BP Solar	Itron	Schlumberger
Brooks Automation	ITT Industries	Schneider Electric
Canadian Solar	John Deere	Sharp
Caterpillar	KLA Tencor	Shimadzu
China Sunergy	KONE	Siemens
Cisco Systems	Lam Research	Smiths Group
CNH Global	Landis+Gyr	SolarWorld
Cooper Industries	LDK	Solon SE
Cree	Lennox Intl.	SPX
Danaher	LG Electronics	SunPower
Diebold	Mettler Toledo	Suntech Power
Dresser	Mitsubishi	Teradyne
Eaton	National Instruments	Thermo Fisher
Electrolux	National Semi	ThyssenKrup
Elster Group	NCR	Tokyo Electron
Emerson	NEC	Toshiba
Federal Signal	Nichia	Trina Solar
First Solar	Novellus	Tyco
Fronius International	Omron	UTC
Fuji Electric	OSRAM	Waters
Fujitsu	Panasonic	Whirlpool
		Yokogawa

The Worldwide Industrial Electronics Assembly Market - 2012 Edition

Partial List of Tables

- Table 4-1: Industrial Products E-COGS Market by Category and Region (\$M), 2012
 Table 4-2: EMS Industrial Products E-COGS Market by Product and Region (\$M), 2012
 Figure 4-1: Industrial Products E-COGS Market by Supplier (\$M), 2012
 Table 4-3: Industrial Process Control E-COGS by Product and Region (\$M), 2012
 Table 4-4: Top Ten OEMs of Industrial Process Control E-COGS by Region (\$M), 2012
 Table 4-5: Top Ten Outsourcing OEMs of Industrial Process Control E-COGS by Region (\$M), 2012
 Table 4-6: Top Ten Suppliers of Automation/Logic Products by Region (\$M), 2012
 Table 4-7: Top Ten Outsourcing OEMs of Automation/Logic Products E-COGS by Region (\$M), 2012
 Table 4-8: Top Ten Suppliers of Const/Agricul/Mining Electronic Assemblies by Region (\$M), 2012
 Table 4-9: Leading Outsourcing OEMs of Construction/Agriculture/Mining Products by Region (\$M)
 Table 4-10: Top Ten Suppliers of Electric Motor Assemblies by Region (\$M), 2012
 Table 4-11: Top Ten Suppliers of Electrical Distribution/Smart Grid by Region (\$M), 2012
 Table 4-12: Leading Suppliers of Elevator Systems by Region (\$M), 2012
 Table 4-13: Top Ten Suppliers of Environmental Management Systems by Region (\$M), 2012
 Table 4-14: Top Ten Suppliers of Fluid Control/Hydraulic Systems by Region (\$M), 2012
 Table 4-15: Top Ten Suppliers of Marine/Wastewater Systems by Region (\$M), 2012
 Table 4-16: Top Ten Suppliers of Oil & Gas Systems by Region (\$M), 2012
 Table 4-17: Top Ten Suppliers of Power Supply Systems by Region (\$M), 2012
 Table 4-18: Leading Outsourcing OEMs of Industrial Power Supply Systems by Region (\$M), 2012
 Table 4-19: Top Ten Suppliers of Robotics by Region (\$M), 2012
 Table 4-20: Leading Outsourcing OEMs of Robotic Systems by Region (\$M), 2012
 Table 4-21: Top Ten Suppliers of Smart Meters by Region (\$M), 2012
 Table 4-22: Leading Outsourcing OEMs of Smart Meters by Region (\$M), 2012
 Table 4-23: Top Ten Suppliers of UPS/Battery Systems by Region (\$M), 2012
 Table 4-24: Test & Measurement E-COGS by Product and Region (\$M), 2012
 Table 4-25: Top Ten OEMs of Test & Measurement E-COGS by Region (\$M), 2012
 Table 4-26: Top Ten Outsourcing OEMs of T & M Equipment E-COGS by Region (\$M), 2012
 Table 4-27: Top Ten OEMs of Inspection Equipment E-COGS by Region (\$M), 2012
 Table 4-28: Leading Outsourcing OEMs of Inspection Equipment E-COGS by Region (\$M), 2012
 Table 4-29: Top Ten OEMs of Instruments and Metrology Equipment E-COGS by Region (\$M), 2012
 Table 4-30: Leading Outsourcing OEMs of Inst/Metrology Equipment E-COGS by Region (\$M), 2012
 Table 4-31: Top Ten OEMs of Semiconductor Equipment E-COGS by Region (\$M), 2012
 Table 4-32: Leading Outsourcing OEMs of Semiconductor Equipment E-COGS by Region (\$M), 2012
 Table 4-33: Top Ten OEMs of Test Equipment E-COGS by Region (\$M), 2012
 Table 4-34: Top Ten Outsourcing OEMs of Test Equipment E-COGS by Region (\$M), 2012
 Table 4-35: Other Industrial Equipment E-COGS by Product and Region (\$M), 2012
 Table 4-36: Top Ten OEMs of Other Industrial Equipment E-COGS by Region (\$M), 2012
 Table 4-37: Top Ten Outsourcing OEMs of Other Industrial Equipment E-COGS by Region (\$M), 2012
 Table 4-38: Top Ten OEMs of ATM/Gaming/Vending E-COGS by Region (\$M), 2012
 Table 4-39: Leading Outsourcing OEMs of ATM/Gaming/Vending E-COGS by Region (\$M), 2012
 Table 4-40: Top Ten Suppliers of HVAC Systems by Region (\$M), 2012
 Table 4-41: Leading Outsourcing OEMs of HVAC Systems E-COGS by Region (\$M), 2012
 Table 4-42: Top Ten OEMs of Laundry/Home Appliances E-COGS by Region (\$M), 2012
 Table 4-43: Leading Outsourcing OEMs of Laundry/Home Appliances E-COGS by Region (\$M), 2012
 Table 4-44: Top Ten Suppliers of Lighting/LED Products by Region (\$M), 2012
 Table 4-45: Top Ten OEMs of Security/Safety Products E-COGS by Region (\$M), 2012
 Table 4-46: Leading Outsourcing OEMs of Safety/Security Products E-COGS by Region (\$M), 2012
 Table 4-47: Top Ten OEMs of Tools E-COGS by Region (\$M), 2012
 Table 4-48: Leading Outsourcing OEMs of Tools E-COGS by Region (\$M), 2012
 Table 4-49 Top Ten OEMs of Specialty/Handling Equipment E-COGS by Region (\$M), 2012
 Table 4-50: Leading Outsourcing OEMs of Specialty/Handling E-COGS by Region (\$M), 2012
 Table 4-51: Clean Energy Products E-COGS by Product and Region (\$M), 2012
 Table 4-52: Top Ten OEMs of Clean Energy Equipment E-COGS by Region (\$M), 2012
 Table 4-53: Leading Outsourcing OEMs of Clean Energy Equipment E-COGS by Region (\$M), 2012
 Table 4-54: Leading OEMs of Fuel Cells E-COGS by Region (\$M), 2012
 Table 4-55: Leading Outsourcing OEMs of Fuel Cells E-COGS by Region (\$M), 2012
 Table 4-56: Top Ten Suppliers of Inverters by Region (\$M), 2012
 Table 4-57: Leading Outsourcing OEMs of Inverters E-COGS by Region (\$M), 2012
 Table 4-58: Top Ten OEMs of Solar PV Products E-COGS by Region (\$M), 2012
 Table 4-59: Leading Outsourcing OEMs of Solar PV Products E-COGS by Region (\$M), 2012
 Table 4-60: Leading Suppliers of Tidal Systems by Region (\$M), 2012
 Table 4-61: Leading Outsourcing OEMs of Tidal Systems E-COGS by Region (\$M), 2012
 Table 4-62: Leading OEMs of Wind Energy Products E-COGS by Region (\$M), 2012
 Table 5-1: OEM Industrial Assembly TAM Forecasted E-COGS by Market Segment (\$M), 2011 - 2016
 Table 5-2: EMS Industrial TAM Forecasted E-COGS by Market Segment (\$M), 2011 - 2016
 Table 5-3: EMS E-COGS of Total Available Market (%), 2011 - 2016
 Table 5-4: OEM TAM Forecasted for Process Control E-COGS by Product (\$M), 2011 - 2016
 Table 5-5: EMS TAM Forecasted for Process Control E-COGS by Product (\$M), 2011 - 2016
 Table 5-6: OEM TAM Forecasted for Test & Measurement E-COGS by Product (\$M), 2011 - 2016
 Table 5-7: EMS Test & Measurement Forecasted Equipment E-COGS by Product (\$M), 2011 - 2016
 Table 5-8: OEM Other Industrial Forecasted Equipment E-COGS by Product (\$M), 2011 - 2016
 Table 5-9: EMS Other Industrial Forecasted Equipment E-COGS by Product (\$M), 2011 - 2016
 Table 5-10: OEM Clean Energy Forecasted Equipment E-COGS by Product (\$M), 2011 - 2016
 Table 5-11: EMS Clean Energy Forecasted Equipment E-COGS by Product (\$M), 2011 - 2016

Published March 2012, 239 Pages

Order Form

Payment Method

Check in the amount of \$ _____ is enclosed.

Invoice per P.O. # _____

Please charge: Visa MasterCard American Express

Card # _____ Exp. _____

Name on Card _____

Signature _____ Date _____

Name _____

Title _____

Company _____

Address _____

City/State/Zip _____

Telephone _____

Fax _____

E-mail _____

The Worldwide Industrial Electronics Assembly Market, 2012 Edition (single user license - PDF file shipped electronically) \$3495

Add Extra Single User License (\$250 each) or Corporate License (\$1,000)

Returns: No return privileges. **International Orders:** Must be prepaid, please contact us for payment arrangements.

New Venture Research Corp.

5641 GW Eindhoven, THE NETHERLANDS
 Tel: 31-06 4100 9362 - www.alerta-intelligence.com;
 frank.klomp@alerta-intelligence.com

Subtotal	
Add Excel Spreadsheet of all tables (\$500)	
TOTAL	