

Now Available!

The Worldwide OEM, EMS and ODM Electronics Assembly Market in Historical Perspective 1992 - 2011

A Unique Chronology of Electronics Assembly for 19 Years

Excel Database Highlights

■ Product Segment Analysis

- ◆ **Automotive**
- ◆ **Communications**
- ◆ **Computers/Peripherals**
- ◆ **Consumer Electronics**
- ◆ **Industrial**
- ◆ **Medical**
- ◆ **Aerospace/Military**
- ◆ **Other Transportation**

■ Industry Analysis

- ◆ **Assembly Revenue by OEM, EMS, ODM**
- ◆ **Assembly Revenue by 42 Countries**
- ◆ **Assembly Revenue by 49 Products**

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Synopsis

The worldwide electronics assembly market has experienced enormous growth over the last 19 years, nearly quadrupling in size to be approximately \$1.1 trillion dollars in terms of cost of goods sold (COGS) as of 2011. Yet, the growth in the trend to outsource production to EMS (electronic manufacturing service) and ODM (original design manufacturer) companies has been more dramatic, expanding at a compound annual growth rate of nearly 20 percent and today accounting for approximately 40 percent of all electronics manufacturing assembly.

New Venture Research (NVR) (and the previous owner Electronic Trend Publications) have tracked the electronics assembly industry for decades with its research reports that focus on all aspects of this industry. **The Worldwide OEM, EMS and ODM Electronics Assembly Market in Historical Perspective, 1992 - 2011** is a peerless database that summarizes all electronics assembly on a worldwide basis. It has been developed by studying almost 300 leading OEM electronics companies and approximately 100 leading EMS/ODM firms in 49 different product categories and their manufacturing activities in 42 different countries.

The database provides production assembly of electronics products in four unique regions.

Americas (North, South, Central)
EMEA (Europe, Middle East, Africa)
APAC (Asia Pacific region)
ROW (Rest of the World)

The database also segments the worldwide electronics assembly value into seven major markets.

Automotive
Communications
Computers/Peripherals
Consumer Electronics
Industrial
Medical
Aerospace/Military/
Other Transportation

Trend analysis of at least 25 leading products (such commodities as mobile phones and computers) both in terms of units of production and COGS assembly value is provided by manufacturing supplier. Moreover, trend information about the migration of outsourced production from the Americas and EMEA to Asia, and especially China, is also summarized. **NVR** has been following the EMS market since it's first syndicated report in 1992, and this database provides the complete statistical figures of all reports over the last 19 years (each year starting in 1998) as well as in aggregate for convenient macro-analysis.

This unique database will provide you with detailed and comprehensive information on this significant and still-expanding market. The database is delivered by email as a single-user Excel file and sells for \$4,995. An extra single-user license is \$250 and a corporate license is \$1,000.

About the Author

Randall Sherman, president of New Venture Research Corp., a California market research and business consulting firm focused on the EMS and OEM electronics manufacturing industries, serves as principal analyst for this database. Mr. Sherman has more than 20 years' experience in technology and business research. He began his career as a telecom network design engineer. He has held senior positions at various market research firms, including Creative Strategies and Frost and Sullivan. Mr. Sherman holds an MSEE from the University of Colorado and an MBA from the Edinburgh School of Business.

Electronics Assembly by Product and Country, 1992-2011

Automotive

Engine Controls
Instrumentation
Safety Modules
Entertainment Devices
Total Automotive Summary

Communications

Mobile Phones
Infrastructure
Other Phones
Enterprise LANs
Wireless LANs
DSL/Cable Modems
Dial-up Modems
PBX/Key Systems
Carrier-Class
Other Communications
Total Communications Summary

Computer/Peripherals

Notebooks
Desktops
Tablets
Servers
Workstations
ESS
Monitors
Printers
Handhelds/PDAs
E-Readers
Other Computer
Total Computer Summary

Consumer Electronics

Analog TV
Digital TV
MP3
Other Audio
Games
Set-Top Boxes
Camcorders
DVD/DVR/VCR
Digital Cameras
Personal Navigation
Other Consumer
Total Consumer Summary

Industrial

Process Control
Test & Measurement
Other Industrial
Clean Energy
Total Industrial Summary

Medical

Monitoring/Test
Therapeutic
Diagnostics/Surgical
Total Medical Summary

Aerospace/Military/Other

In-Flight Entertainment
Navigation Systems
Weapons
C3 Systems
Other Military
Other Aerospace/Other
Total Aerospace/Military/Other Summary

Americas

Total Production Assembly Value by Country
(Brazil, Canada, Mexico, USA, Rest of
Americas)
Assembly Value by OEM, EMS, ODM

EMEA

Total Production Assembly Value by Country
(Austria, Belgium, Bulgaria, Czech Republic,
Denmark, England, Estonia, Finland, France,
Germany, Hungary, Ireland, Israel, Italy,
Lithuania, Morocco, Netherlands, Norway,
Poland, Romania, Russia, Scotland, Slovakia,
Spain, Sweden, Switzerland, Tunisia, Ukraine,
Rest of the Europe)
Assembly Value by OEM, EMS, ODM

APAC

Total Production Assembly Value by Country
(Australia, China, India, Indonesia,
Japan, Korea, Malaysia, Philippines,
Singapore, Taiwan, Thailand, Vietnam,
Rest of Asia)
Assembly Value by OEM, EMS, ODM

The Worldwide Electronics Assembly Market in Historical Perspective, 1992 - 2011

Sample Worksheet of Data Contained in Spreadsheet for Year 2007

Worldwide Electronics Assembly Summary

<u>Worldwide Assembly Value (\$M)</u>	<u>2007</u>
Computer	299,251
Communications	218,326
Consumer	220,631
Industrial	62,682
Medical	38,248
Automotive	74,861
Aviation/Defense/Other	44,729
Total	958,728

<u>Total by Supplier (\$M)</u>	<u>2007</u>
OEM	631,488
ODM	85,838
EMS	175,549
MPU+DRAM	65,852
Total	958,728

<u>Total by Region (\$M)</u>	<u>2007</u>
Americas	51,854
EMEA	41,681
APAC	157,884
ROW	9,969
Total	261,388

<u>EMS Total by Region (\$M)</u>	<u>2007</u>
Americas	45,732
EMEA	37,420
APAC	84,561
ROW	7,836
Total	175,549

<u>ODM Total by Region (\$M)</u>	<u>2007</u>
Americas	6,122
EMEA	4,260
APAC	73,323
ROW	2,133
Total	85,838

<u>Total by Industry (\$M)</u>	<u>2007</u>
Automotive	5,800
Communications	78,235
Computer	92,111
Consumer	44,717
Industrial	18,267
Medical	12,472
Commercial Aviation	3,915
Defense/Other	5,872
Total	261,388

<u>EMS Total by Industry (\$M)</u>	<u>2007</u>
Automotive	4,912
Communications	57,560
Computer	50,927
Consumer	28,223
Industrial	16,276
Medical	10,534
Commercial Aviation	2,847
Defense/Other	4,271
Total	175,549

<u>ODM Total by Industry (\$M)</u>	<u>2007</u>
Automotive	888
Communications	20,675
Computer	41,185
Consumer	16,494
Industrial	1,991
Medical	1,938
Commercial Aviation	1,067
Defense/Other	1,601
Total	85,838

The Worldwide Electronics Assembly Market in Historical Perspective, 1992 - 2011

Sample Worksheet of Data Contained in Spreadsheet for Year 2007

OEM Electronics Assembly by Product/Segment

Communications Product Units (M) 2007

Cellular Handsets	1,144
Other Phones	200
DSL/Cable Modems	85

Communications Assembly Value (\$M) 2007

Cellular Handsets	102,979
Cellular Infrastructure	34,384
Other Phones	8,295
Enterprise LANs	15,561
WLANS	3,995
DSL/Cable Modems	5,298
PBX/Other CPE	13,341
Carrier-Class	27,541
Other	6,932
Total	218,326

Computer Product Units (M) 2007

Notebook PCs	109.0
Desktop PCs	162.2
Servers	8.8
Workstations	3.0
Enterprise Storage Systems	2.2
Hard Disk Drives	401.1
CD/DVD Drives	311.3
Floppy Drives	380.0
Monitors	208.2
Printers	157.0
PDA's	19.0

Computer Assembly Value (\$M) 2007

Notebook PCs	71,134
Desktop PCs	82,901
Servers	36,288
Workstations	7,568
Enterprise Storage Systems	7,247
Flash Drives	6,787
Monitors	35,360
Printers	19,952
PDA's	4,389
Other	27,626
Total	299,251

Consumer Product Units (M) 2007

Analog TVs	60
Digital TVs	120
MP3 Players	98
Other Audio	283
Console Video Games	30
Set-Top Boxes	110
Camcorders	17
DVD Players	145
Digital Cameras	122
Personal Navigation Devices	25
Memory Cards	406

Consumer Assembly Value (\$M) 2007

Analog TVs	7,459
Digital TVs	78,355
MP3 Players	12,357
Other Audio	12,280
Console Video Games	10,294
Set-Top Boxes	20,023
Camcorders	6,333
DVD Players	14,011
Digital Cameras	17,889
Personal Navigation	3,654
Memory Cards	7,287
Other	30,688
Total	220,631

Industrial Assembly Value (\$M) 2007

Control/Processing	31,980
Test and Measurement	21,413
Other Industrial	9,289
Total Industrial	62,682

Medical Assembly Value (\$M) 2007

Medical Diagnostics	19,231
Therapeutic	8,755
Monitoring & Surgical	10,263
Total	38,248

Automotive Assembly Value (\$M) 2007

Engine Control	23,712
Instruments	10,959
Safety	25,440
Entertainment	14,750
Total	74,861

The Worldwide Electronics Assembly Market in Historical Perspective, 1992 - 2011

Sample Worksheet of Data Contained in Spreadsheet for Year 2007

EMS/ODM Electronics Assembly by Product/Segment

Total Communications (\$M)	2007
Enterprise LANs	9,789
DSL/Cable Modems	3,465
Cellular Handsets	29,151
Other Phones	2,840
Wireless LANs	1,877
Cellular Infrastructure	13,701
PBX/Other CPE	4,034
Carrier-Class Switches/Routers	10,376
Other Telecom	3,002
Total	78,235

Total Computer (\$M)	2007
Notebook PCs	19,507
Desktop PCs	20,603
Servers	16,729
Workstations	2,950
Enterprise Storage Systems	4,440
Stand-Alone Monitors	7,444
Printers	13,125
Handhelds	2,337
Other Computer	4,977
Total	92,111

EMS Communications (\$M)	2007
Enterprise LANs	8,267
DSL/Cable Modems	647
Cellular Handsets	21,682
Other Phones	487
Wireless LANs	288
Cellular Infrastructure	11,965
PBX/Other CPE	2,770
Carrier-Class Switches/Routers	8,941
Other Telecom	2,513
Total	57,560

EMS Computer (\$M)	2007
Notebook PCs	5,161
Desktop PCs	5,368
Servers	13,506
Workstations	2,818
Enterprise Storage Systems	4,359
Stand-Alone Monitors	4,183
Printers	12,189
Handhelds	1,474
Other Computer	1,867
Total	50,927

ODM Communications (\$M)	2007
Enterprise LANs	1,522
DSL/Cable Modems	2,818
Cellular Handsets	7,469
Other Phones	2,353
Wireless LANs	1,589
Cellular Infrastructure	1,735
PBX/Other CPE	1,263
Carrier-Class Switches/Routers	1,435
Other Telecom	489
Total	20,675

ODM Computer (\$M)	2007
Notebook PCs	14,346
Desktop PCs	15,235
Servers	3,223
Workstations	132
Enterprise Storage Systems	81
Stand-Alone Monitors	3,260
Printers	936
Handhelds	863
Other Computer	3,110
Total	41,185

The Worldwide Electronics Assembly Market in Historical Perspective, 1992 - 2011

Sample Worksheet of Data Contained in Spreadsheet for Year 2007

EMS/ODM Electronics Assembly by Product/Segment

Total Consumer (\$M)	2007
Analog TVs	566
Digital TVs	16,291
MP3 Players	4,836
Other Audio	771
Video Console Games	3,828
Set-Top Boxes	5,869
Camcorders	524
DVD Players	1,691
Digital Cameras	3,681
Personal Navigation	1,827
Other Consumer	4,833
Total	44,717

Total Industrial (\$M)	2007
Control/Processing	5,189
Test and Measurement	6,530
Other Industrial	6,548
Total	18,267

EMS Industrial (\$M)	2007
Control/Processing	4,463
Test and Measurement	6,071
Other Industrial	5,742
Total	16,276

EMS Consumer (\$M)	2007
Analog TVs	196
Digital TVs	6,369
MP3 Players	3,974
Other Audio	530
Video Console Games	1,849
Set-Top Boxes	5,700
Camcorders	231
DVD Players	987
Digital Cameras	3,534
Personal Navigation	1,644
Other Consumer	3,207
Total	28,223

ODM Industrial (\$M)	2007
Control/Processing	726
Test and Measurement	459
Other Industrial	806
Total	1,991

Total Medical (\$M)	2007
Medical Diagnostics	8,047
Therapeutic	1,030
Monitoring and Surgical	3,394
Total	12,472

EMS Medical (\$M)	2007
Medical Diagnostics	6,253
Therapeutic	1,030
Monitoring and Surgical	3,251
Total	10,534

ODM Consumer (\$M)	2007
Analog TVs	370
Digital TVs	9,921
MP3 Players	863
Other Audio	241
Video Console Games	1,979
Set-Top Boxes	169
Camcorders	292
DVD Players	704
Digital Cameras	147
Personal Navigation	183
Other Consumer	1,626
Total	16,494

ODM Medical (\$M)	2007
Medical Diagnostics	1,795
Therapeutic	143
Monitoring and Surgical	143
Total	1,938

The Worldwide Electronics Assembly Market in Historical Perspective, 1992 - 2011

Sample Worksheet of Data Contained in Spreadsheet for Year 2007

EMS/ODM Electronics Assembly by Product/Segment

<u>Total Automotive (\$M)</u>	<u>2007</u>
Engine Control	-
Instruments	859
Safety	1,018
Entertainment	3,922
Total	5,800

<u>EMS Automotive (\$M)</u>	<u>2007</u>
Engine Control	859
Instruments	1,018
Safety	3,034
Entertainment	4,912
Total	5,380

<u>ODM Automotive (\$M)</u>	<u>2007</u>
Engine Control	
Instruments	
Safety	
Entertainment	888
Total	888

<u>Total Commercial Aviation (\$M)</u>	<u>2007</u>
In-Flight Entertainment	639
Flight Navigation - Comm	1,484
Other Aviation	1,792
Total Commercial Aviation	3,915

<u>Military/Defense</u>	
Flight Navigation - Mil.	2,775
Weapons/Combat	631
C3	606
Other Transportation	1,861
Total Defense/Other	5,872

Total Transportation 9,787

EMS

<u>Commercial Aviation (\$M)</u>	<u>2007</u>
In-Flight Entertainment	619
Flight Navigation - Comm.	1,464
Other Aviation	764
EMS Total Commercial Aviation	2,847

Military/Defense

Flight Navigation - Mil.	1,475
Weapons/Combat	631
C3	599
Other Transportation	1,566
EMS Total Defense/Other	4,271

Total EMS Transportation 7,118

ODM

<u>Commercial Aviation (\$M)</u>	<u>2007</u>
In-Flight Entertainment	19
Flight Navigation - Comm.	20
Other Aviation	1,029
Total ODM Commercial Aviation	1,067

Military/Defense

Flight Navigation - Mil.	1,300
Weapons/Combat	-
C3	6
Other Transportation	294
Total ODM Defense/Other	1,601

Total ODM Transportation 2,668

The Worldwide Electronics Assembly Market in Historical Perspective, 1992 - 2011

Sample Worksheet of Data Contained in Spreadsheet for Year 2007

EMS/ODM Electronics Assembly by Country/Region

Total Americas (\$M)	2007
Canada	3,799
Mexico	17,156
USA	30,899
Total	51,854

EMS Americas (\$M)	2007
Canada	3,345
Mexico	14,059
USA	28,329
Total	45,732

ODM Americas (\$M)	2007
Canada	455
Mexico	3,098
USA	2,570
Total	6,122

Total EMEA (\$M)	2007
Austria	702
Belgium	849
Czech Republic	718
Denmark	81
England	3,580
Estonia	481
Finland	2,835
France	3,525
Germany	8,301
Hungary	3,062
Ireland	3,097
Italy	1,799
Netherlands	1,666
Poland	559
Russia	217
Scotland	2,351
Slovakia	157
Spain	1,032
Sweden	4,016
Switzerland	838
Rest of Europe	1,815
Total	41,681

EMS EMEA (\$M)	2007
Austria	702
Belgium	808
Czech Republic	544
Denmark	81
England	3,341
Estonia	481
Finland	2,815
France	3,525
Germany	5,753
Hungary	2,891
Ireland	2,932
Italy	1,799
Netherlands	1,571
Poland	336
Russia	210
Scotland	2,213
Slovakia	157
Spain	973
Sweden	4,007
Switzerland	838
Rest of Europe	1,445
Total	37,420

ODM EMEA (\$M)	2007
Belgium	41
Czech Republic	174
England	239
Finland	20
Germany	2,548
Hungary	171
Ireland	166
Netherlands	95
Poland	223
Russia	7
Scotland	138
Spain	59
Sweden	9
Rest of Europe	370
Total	4,260

Total APAC (\$M)	2007
China	94,107
Indonesia	773
Japan	11,094
Korea	4,190
Malaysia	6,785
Philippines	2,042
Singapore	2,407
Taiwan	26,394
Thailand	9,050
Other Asia	1,041
Total	157,884

The Worldwide Electronics Assembly Market in Historical Perspective, 1992 - 2011

Partial List of Companies Profiled

EMS/ODM Electronics Assembly by Country/Region

EMS APAC (\$M)	2007
China	51,790
Indonesia	743
Japan	8,376
Korea	50
Malaysia	6,765
Philippines	1,148
Singapore	1,955
Taiwan	3,727
Thailand	9,015
Other Asia	991
Total	84,561

ODM APAC (\$M)	2007
China	42,317
Indonesia	30
Japan	2,718
Korea	4,140
Malaysia	20
Philippines	894
Singapore	452
Taiwan	22,668
Thailand	35
Other Asia	50
Total	73,323

Total ROW (\$M)	2007
Australia	458
Brazil	7,055
India	1,495
Israel	299
Puerto Rico	521
Other ROW	142
Total	9,969

EMS ROW (\$M)	2007
Australia	403
Brazil	5,331
India	1,151
Israel	299
Puerto Rico	521
Other ROW	132
Total	7,836

ODM ROW (\$M)	2007
Australia	55
Brazil	1,724
India	344
Other ROW	10

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The Worldwide OEM, EMS and ODM Electronics Assembly Market in Historical Perspective, 1992 - 2011

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