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# THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

***2014 Edition***

**The Most Comprehensive Study Available on the  
Worldwide EMS Market**

## Report Highlights

- **Worldwide Electronics Market Analysis, 2013–2018**
  - ◆ 48 Product Segments by Region and Supplier
  - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2013–2018**
  - ◆ OEM vs. Outsourced (EMS and ODM Subcontract)
  - ◆ EMS, ODM, and OEM Production Market Share by Region, Market Segment and Product
  - ◆ Regional Manufacturing Distribution by 45 Countries
  - ◆ Product Analysis by EMS, ODM, OEM, and Country
- **Financial Benchmarks**
  - ◆ Market Segment Metrics - Revenue/Margin/Earnings
  - ◆ Revenue per Sq. Ft./ per SMT Line/ per Employee
  - ◆ WW Labor Rates, ROA/ROE - Highest Performers
- **In-Depth Company Profiles (Highest Performing EMS and ODM Companies from \$100+ Million - total 88)**

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# The Worldwide EMS Market - 2014 Edition

## Synopsis

The worldwide electronics manufacturing services (EMS) market is a determining force in production of electronics products and now accounts for almost 40 percent of all assembly. While the rate of growth for outsourcing is slowing, it still represents the most desired manufacturing model for the assembly of electronics products available to OEM companies. The EMS industry expanded approximately 4.9 percent in 2013 as a result of a downturn year when normal growth could easily have been double without decline in demand for computer desktop and notebook products.

**New Venture Research (NVR)** has followed this industry for over 20 years and is pleased to offer our latest update on this continually expanding market. Our report, *The Worldwide Electronics Manufacturing Services Market – 2014 Edition* is the most comprehensive market research report on the EMS industry. This analysis focuses on the leading players, growing market segments, total available market (TAM), and emerging manufacturing opportunities and technologies by numerous product and country.

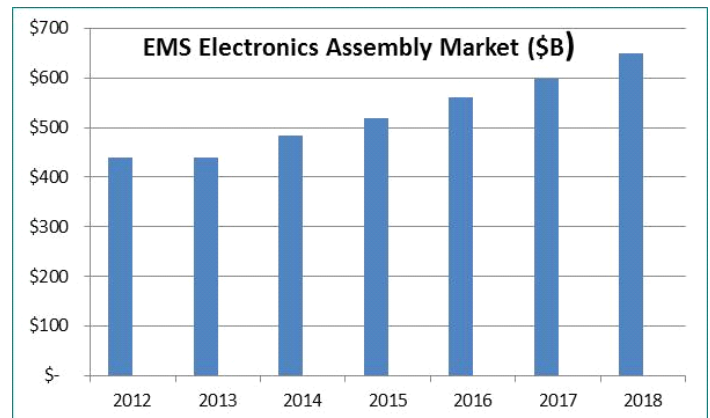
The report begins with a forecast of the worldwide electronics assembly market in terms of cost of goods sold, thus providing a baseline for the manufacturing value of electronics product assemblies. This forecast is checked against 48 individual product segments in the automotive, communications, computer/peripherals, consumer, industrial, medical, and aerospace and defense industries. **NVR** estimates that total electronics assembly value was \$1.3 trillion in 2013 and will grow to approximately \$1.8 trillion in 2018 – a 5.9 percent compounded annual growth rate. Fueled by the demand for EMS services, **NVR** believes that the EMS industry will grow from \$440 billion in 2013 to \$639 billion in 2018 - approximately at a 7.7 percent CAGR.

To support this conclusion, the report analyzes the EMS industry in a variety of ways. First, it reviews the worldwide market for EMS and OEM electronics assembly by individual product. Second, the report analyzes the EMS industry, including a breakdown of

all of products and markets in terms of EMS revenue, OEM revenue, and regional trends by country and cost. No other report gives such detail by country wage rate and regional product assembly. This database can be purchased as an Excel file to allow for easy analysis of the hundreds of variables collected in the report.

The report also includes an EMS financial performance analysis for the best-performing companies and examines a variety of critical financial metrics. Another chapter reviews EMS mergers and acquisitions for the past few years and the impact on the growth of the industry and its competitiveness.

The report concludes with profiles of the largest EMS and ODM firms (88 companies) from all over the world. These reviews summarize the market focus of each company, its leading customers, and each company's financial production performance statistics. The intent of these profiles is to serve as a global directory and competitive analysis tool for industry participants.



*The Worldwide Electronics Manufacturing Services Market, 2014 Edition* is the product of hundreds of hours of research. The report sells for \$3995, with extra single-user licenses at \$350 and a corporate license at \$1250. This report is available in PDF format and is delivered by email (print at extra cost). An Excel spreadsheet of all data and tables may also be obtained for an additional \$750.

## About the Author

**Randall Sherman** is the president 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 began his career as a telecom network design engineer and holds an undergraduate degree in Astrophysics. He has held senior positions at various market research firms, including Creative Strategies, Frost and Sullivan, and BIS Strategic Decisions. Mr. Sherman holds an MSEE from the University of Colorado and an MBA from the Edinburgh School of Business.

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AmTRAN	IMI	Selcom
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