

Now Available!

THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

2015 Edition

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

Report Highlights

- **Worldwide Electronics Market Analysis, 2014–2019**
 - ◆ 48 Product Segments by Region and Supplier
 - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2014–2019**
 - ◆ OEM vs. Outsourced (EMS and ODM Subcontract)
 - ◆ EMS, ODM, and OEM Production Market Share by Region, Market Segment, and Product
 - ◆ Regional Manufacturing Distribution by 48 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 89)**

New Venture Research Corp.

337 Clay St., Suite 101
Nevada City, CA 95959
Tel: (408) 244-1100

A Technology Market Research Company

kwilliams@newventureresearch.com
www.newventureresearch.com
Fax: (530) 265-1998

The Worldwide EMS Market - 2015 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 5.3 percent in 2014 as a result of the slowing of sales for PCs (desktop and notebook).

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 – 2015 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.

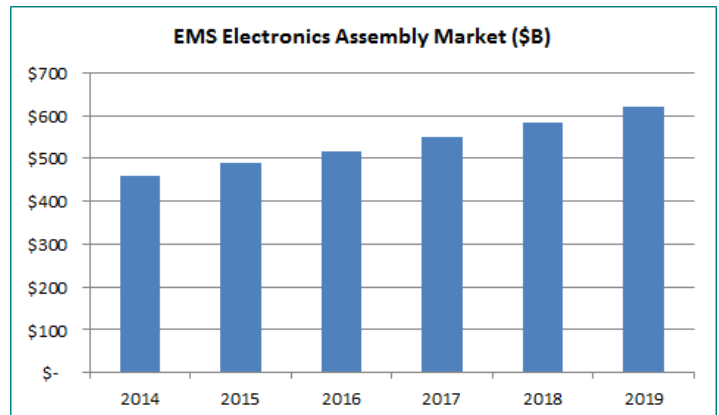
The report begins with a forecast of the worldwide electronics assembly market in terms of cost of goods sold, thus providing a baseline for the manufacturing value of electronics product assemblies. This forecast is checked against 48 individual product segments in the automotive, communications, computer/peripherals, consumer, industrial, medical, and aerospace and defense industries. **NVR** estimates that total electronics assembly value was \$1.3 trillion in 2014 and will grow to approximately \$1.8 trillion in 2019 – a 5.7 percent compounded annual growth rate. Fueled by the demand for EMS services, **NVR** believes that the EMS industry will grow from \$460 billion in 2014 to \$621 billion in 2019 - approximately at a 6.2 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 the market leaders and relative share by industry and

and region. Third, the market opportunity for emerging growth is presented by product and country. No other report gives such detail by country wage rate and regional product assembly. This database can also 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 (89 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, 2015 Edition is the product of hundreds of hours of research. The report sells for \$3995, with extra single-user licenses at \$500 and a corporate license at \$1500. 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 \$1000.

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.

The Worldwide EMS Market - 2015 Edition

Table of Contents

Chapter 1: Introduction

- Objectives
- Organization
- Methodology

Chapter 2: Executive Summary

- Worldwide Market Forecast
- Regional Market Share
- Application Market Share
- EMS Market Share
- EMS Performance

Chapter 3: Worldwide Electronics Industry Forecast, 2014 - 2019

- Overview
- World Economic Outlook
- Summary Forecast
- Industry Forecasts
 - Communications (9 product segments)
 - Computers (11 product segments)
 - Consumer (12 product segments)
 - Industrial (4 product segments)
 - Medical (3 product segments)
 - Automotive (4 product segments)
 - Aviation, Defense, Other Transportation

Chapter 4: EMS Industry Structure, 2014

- The Worldwide OEM Market for Electronic Products
- Manufacturing Sources for Electronics Products
- OEM Market by Seven Market Segments
- EMS Market by Manufacturing Source (OEM, EMS)
- EMS Statistics by Company Size (large/med/small)
- Regional Production Market Share (48 Countries)
 - Americas (5 countries)
 - EMEA (30 countries)
 - APAC (13 countries)
- Industry Production by Market Share (48 products)
 - Communications (9 product segments)
 - Computer (11 product segments)
 - Consumer (12 product segments)
 - Industrial (4 product segments)
 - Medical (3 product segments)
 - Automotive (4 product segments)
 - Commercial Aviation (5 product segments)
 - Military/Defense, Other Transportation
- Worldwide EMS Supplier Market Share

Chapter 5: Industry Forecast, 2014-2019

- Worldwide OEM Market for all Electronic Products
- Manufacturing Source for Electronics Assembly
 - OEM Market by Product and Market Segment
 - EMS Market by Production Source (OEM, EMS)
 - Regional Production Share by Country/Segment
 - Product Application Forecast (EMS, ODM)
 - Total WW Available Market by Product

Chapter 6: Financial Benchmarks

- Overview
- Financial Performance Benchmarks
 - 5-Year Sales Growth Rankings
 - Net Income Averages by Market Segment
 - Gross Margins by Market Segment
 - Return on Assets (Average plus Leaders)
 - Return on Equity (Averages plus Leaders)
 - Revenue per Employee (Average plus Leaders)
 - Revenue per Square Foot of Manufacturing Space
 - Other Performance Metrics - Earnings per Share Growth (Average plus Leaders)
 - Average Base Wage Rate by 48 Countries
- Summary Performance Rankings by Leading Supplier

Chapter 7: Mergers and Acquisitions

- Past Activity, 2009 - 2014 - Largest and Best Deals by Year
- Acquisition Classes and Valuations - Methods
- Best OEM Divestment Opportunities by Region

Chapter 8: Company Profiles of Leading Suppliers

3CEMS	Gigatek	Providence
Accton	Global Brands	Qisda
Alco	Hana	Quanta
ALL CIRCUITS	HANZA	Ryder Industries
AmTRAN	IEC Electronics	Sanmina-SCI
AsteelFlash	IMI	Scanfil
Ayrshire	Inventec	Selcom
Benchmark	Jabil	Shenzhen Kaifa
Beyonics	KeyTronicEMS	SigmaTron
Celestica	Kimball	SIIX
Cicor	Kitron	SMTC
Compal Electronics	LACROIX	Sparton
Computime	Lite-On	SMT Technologies
Connect	MC ASSEMBLY	Sumitronics
Creation	Micro-Star	SMTH
Delta Electronics	MiTAC	SVI
D-Link	Morey Corp.	Tatung
Di-Nikko	Nam Tai	Topscom
DRS	NATEL EMS*	TopUnion
Ducommun	New Kinpo	TPV
Elemaster	Neways	STMT
Elite	Nippon Mfg.	TT Electronics
EliteGroup	NOTE	UMC
Enics	OnCore*	USI
EOLANE	OSE	Valutronics
ESCATEC	Pan International	Venture
Fabrinet	PartnerTech	VIDEOTON
Fittec	PCI	V.S. Industry
Flextronics	Pegatron	VTech
Foxconn-Hon Hai	Plexus	Wistron
GigaByte	PKC	WKK
		Wong's

* Now NEO Tech

The Worldwide EMS Market - 2015 Edition

Table of Contents (continued)

Partial List of Figures and Tables

Product Industry and Market Segments
 Nominal GDP of Major Countries and Regions
 Real GDP Growth Rates for Selected Countries
 Electronics Assembly Market, 2014–2019
 Computer Products, 2014–2019
 Communications Products, 2014–2019
 Consumer Products, 2014–2019
 Industrial Products, 2014–2019
 Medical Products, 2014–2019
 Automotive Products, 2014–2019
 Commercial Aviation, Defense, Other Transportation Products, 2014–2019
 Worldwide EMS Market, 2014–2019
 Worldwide OEM Market by Mfg. Source, 2014–2019
 Worldwide OEM Market by Industry Segment, 2014–2019
 Worldwide EMS Market by EMS Size, 2014–2019
 Key EMS Statistics by Company Size, 2014
 Worldwide EMS Market by Region, 2014
 Large EMS Manufacturing Facilities by Country, 2014
 Worldwide EMS Market by Country, 2014
 — 48 Countries/Regions
 Worldwide EMS Market by Industry Segment, 2014
 — 7 Market Segments, 48 Products
 — EMS and ODM Rankings
 EMS Market Share, 2014
 ODM Market Share, 2014
 Top Ten CM Market Share, 2014
 Worldwide OEM Market by Industry Segment, 2019
 Worldwide EMS Market by Company Size, 2014–2019
 Worldwide EMS Market by Country and CAGR - 2014 and 2019
 Worldwide Total Market by Country and CAGR - 2014 and 2019

Worldwide EMS Market by Region and Industry Segment, 2014–2019
 Worldwide Total Market by Region and Industry Segment, 2014–2019
 Worldwide EMS and Total Market by Product
 — 48 Product Segments
 — Forecasts from 2014 to 2019
 Summary Financial Performance Metrics for Large Public EMS Companies, 2014
 Key Financial Performance Metrics for Large Public EMS Companies, 2014
 Worldwide EMS Margins by Industry Segment, 2014
 EMS Companies by Revenue Growth Rate, 2009–2014
 EMS Companies by Net Income, 2014
 EMS Companies by Gross Margin, 2014
 EMS Companies by Return on Assets, 2014
 EMS Companies by Return on Equity, 2014
 EMS Companies by Revenue per Employee, 2014
 EMS Companies by Revenue per Square Foot, 2014
 EMS Companies by Average Days Collection, 2014
 EMS Companies by Inventory Turns, 2014
 EMS Companies by Available Cash, 2014
 EMS Companies by Debt to Equity, 2014
 EMS Companies by 5-Year EPS Growth, 2014
 Worldwide Performance Ranking for Leading EMS Companies, 2014
 Worldwide EMS Wage Rates by Country, 2014
 Merger and Acquisition Activity, 2009–2014
 Leading Merger and Acquisition Activity by Company, 2009–2014
 Average Merger and Acquisition Valuations by Company, 2009–2014

Publish Date June 2015 500+ 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 EMS Market, 2015 Edition (Single User License - PDF file shipped electronically)

\$3995

Add Extra Single User License (\$500 each) or Corporate License (\$1,500)

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

New Venture Research Corp.

337 Clay St., Suite 101

Nevada City, CA 95959

Tel: (408) 244-1100 Fax: (530) 265-1998

www.newventureresearch.com; kwilliams@newventureresearch.com

Subtotal

Add Excel Spreadsheet of all tables (\$1000)

TOTAL