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OEM and EMS: A Market and Competitive Analysis - 2016 Edition

A Unique Report Combining In-Depth Review of 360 OEMs' Outsourced Electronics Assembly and Market Share Analysis of 48 Product Segments of the 100 Largest EMS Subcontractors

Report Highlights

- **Market Share by Product Segment Analysis, 2015**
 - ◇ **Automotive**
 - ◇ **Communications**
 - ◇ **Computers/Peripherals**
 - ◇ **Consumer Electronics**
 - ◇ **Industrial**
 - ◇ **Medical**
 - ◇ **Aerospace/Defense/Other Transportation**

- **OEM and EMS Company-Level Analysis, 2015**
 - ◇ **360 Electronic OEM Companies**
 - ◇ **100 Largest EMS Companies**
 - ◇ **Outsourced/In-House Assembly Revenue**
 - ◇ **Assembly Revenue by 48 Product Segments**

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Synopsis

The worldwide electronics assembly market is substantial, the cost of goods sold (COGS) reached approximately \$1.3 trillion dollars by 2015. The market is growing but changing in terms EMS suppliers' market share. This report establishes the market share of the leading 100 EMS suppliers to over 360 OEMs competing in 48 different markets. It is the first of its kind and utilizes NVR's unique database of supplier and contractor data showing the market share of the total available EMS market.

As a result of the information we have developed in previous reports, we were able to put a stake in the ground relating to EMS market share. In our annual EMS report, we analyze industry sales by market segment, as well as by customers that make up that segment for every EMS company. In our annual OEM report, we analyze the amount of OEM outsourcing by market and product segment. Combining these two databases, we have created the basis for estimating and predicting the number of EMS suppliers for each OEM by the market segments served. In some cases, we had specific anecdotal field information, and in others we made logical estimations based on the customer, contractor and market/product segment. The most challenging part of this exercise is estimating the actual value of the subcontracts, since this is not always reported in the press upon engagement. Projections on engagement values were made according to the products being manufactured, the overall market size, and the specific EMS company involved. Data has been cross-checked against previously published reports and verified with our customers and industry participants. It is a puzzle in which we triangulate industry and market size with supplier size and served market.

An example can be provided for the smart phone market for Apple. Whereas Apple's EMS partners are well known, most industry participants are less aware of other OEMs' subcontractors which include Blackberry, Lenovo, Microsoft, NEC, Sony, Toshiba, Xiaomi, and ZTE. This report provides market share information on over 360 OEMs across 48 product segments served by the leading 100 EMS firms.

EMS Supplier of Mobile Phones, 2015	Rev. (\$M)
Foxconn	55,481
Pegatron	12,305
Wistron	3,343
Apple	71,130

The leading OEMs for each segment are chosen not only for their size, but also for their leadership within their industry segment, growth potential, industry leadership, and inclination to outsource electronics assembly to EMS firms.

New Venture Research (NVR) has followed the electronics assembly industry for over 20 years with research reports that focus on all aspects of the electronic manufacturing services industry. The report, **OEM and EMS: A Market and Competitive Analysis - 2016 Edition**, is a comprehensive database in report form that analyzes the 2015 electronics assembly and EMS market worldwide. It is developed through hundreds of hours of research that is unique to the industry.

This report will provide you with critical information needed to understand vendor market share by OEM and EMS supplier. The database is delivered by email as a single-user PDF file and sells for \$3,995. An extra single-user license is \$500 and a corporate license is \$1,500. The Excel database can be purchased for \$1000 and print copies for \$250.

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.

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Other Aerospace/Other Transportation

Total Aerospace/Military/Other Transportation

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List of OEM Companies Profiled for EMS Market Share

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Aisin Seiki	Brocade Communications	Ubiquiti	Samsung Electronics	Pace	Ebara Corp.
Alps Electric	China Putian	Vivo	SanDisk	Panasonic	Electrolux
Audi	China SpaceSat	Vtech	Sharp	Philips	Emerson
AutoLiv	Ciena	Xiaomi	Sony	Pioneer	Exide Technologies
BMW	Cisco Systems	ZTE	Bull	Qisda	Fanuc
Calsonic Kansei	Citrix Systems	<u>Computers/Peripherals</u>	Teradata	Quanta Computer	Federal Signal
Continental	Datang Telecom	Acer	Toshiba	Roland	FEI Company
Daimler	D-Link	Apple, Inc.	TPV	Samsung	First Solar
Delphi	ECl Telecom	ASUSTek	Unisys	Sega	Fronius International
Denso Corporation	Ericsson	Barnes & Noble	Wincor Nixdorf	Sharp	Fuji Electric
Dongfeng	Extreme Networks	Brother Industries	Xerox	Sony	Fujitsu
Eaton	Fujitsu	Canon	<u>Consumer</u>	SVA	Gamesa
Fiat Chrysler	Harmonic	Cisco Systems	Acer	Tatung	GE Industrial
Hella	Harris Corp.	Compal Electronics	Amtran	TCL	Gemalto
Hitachi	Hewlett Packard	Cray, Inc.	Apple	Technicolor	General Dynamics
Hyundai	HTC	Dell, Inc.	Arcelik	TomTom	Global Cash Access
Johnson Controls	Huawei	Delta Electronics	ARRIS Group	Toshiba	Haier
JVC Kenwood	Juniper	EliteGroup	AUO	TPV	Halliburton
Lear Corporation	Kyocera	EMC	Bang & Olufsen	Vestel	Hanwha Q-Cells
Magna International	Lenovo	Epson	Bosch Group	Whirlpool	Hitachi
Mazda Motors	LG Mobile Com	Founder	BOSE	Yamaha	Honeywell
Mitsubishi Electric	Micomax Informatics	Fuji Xerox	Casio Computer	<u>Industrial</u>	IGT
Nissan	Microsoft	Fujitsu	Changhong	ABB	Illumina
Panasonic	Mitel	Gemalto	Cisco	Abengoa	Ingersoll Rand
Peugeot	Motorola Solutions	Great Wall	Compal	Advantest	Itron
Pioneer	NEC	Hewlett-Packard	Daewoo	Agilent	ITT Corp.
Renault	Netgear	Hitachi	EchoStar	ALSTOM	JEOL
Robert Bosch	Nokia Oyj	Hitachi Data	Electrolux	Anritsu	Keysight Technologies
Stoneridge	Oki Electric	IBM	Funai	Applied Materials	KLA Tencor
Tata Motors	Oppo	Intel	Garmin	ASML	Komatsu
Valeo	Panasonic Mobile Comm	Inventec	General Electric	Baldor Electric	KONE Oyj
Visteon	Panda Electronics	Konica Minolta	Haier Electronics	Bharat Heavy Electricals	Lam Research
Volkswagen	Polycom	Lenovo	Harman Intl.	Canadian Solar	Lennox Intl.
Volvo	Qorvo	Lexmark	Hisense	Caterpillar	LG Electronics
<u>Communications</u>	Quanta Computer	Logitech	Hitachi	Changzhou Trina Solar	Mettler Toledo
ADTRAN	Riverbed Technology	MicroStar	Humax	Cisco Systems	Mitsubishi Electric
Alcatel-Lucent	Samsung Electronics	MiTac	JVC/Kenwood	CNH Global	MKS Instruments
Apple Computer	Sanyo	NEC	Konka Group	Coherent	MTS Systems
Arima	Sony Mobile Communications	NetApp, Inc.	LG Electronics	Cree	National Instruments
Arista	Spirent	Oracle	Microsoft	Danaher	NCR
ARRIS	TCL	Pitney Bowes	Midea	Deere & Co.	NEC
Aruba Networks	Telnet	Positivo Informatica	Mitsubishi Electric	Diebold	Nichia
AsusTek	Tellabs	Qisda	Nikon	Dresser-Rand Group	Omron
Avaya	Toshiba	Quanta	Nintendo	Eaton	OSRAM
Blackberry		Ricoh	Olympus		Panasonic Lighting

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List of OEM Companies Profiled for EMS Market Share

<u>Industrial (continued)</u>	<u>Industrial (continued)</u>	<u>Medical (continued)</u>	<u>Medical (continued)</u>	<u>Aerospace/Other (continued)</u>	<u>Aerospace/Other (continued)</u>
Parker-Hannifin	Tyco International	CONMED	Siemens Healthcare	Honda	Teledyne
PerkinElmer	UTC	DaVita Healthcare	Smiths Group	Honeywell	Textron
Robert Bosch	Vestas Wind	Dentsply	St. Jude Medical	Kawasaki	Thales
Rockwell Automation	Waters	Dragerwerk	Stryker	L-3	United Technologies
Rohde & Schwartz	Whirlpool Corporation	Edwards Lifesciences	Terumo	Lockheed Martin	Yamaha
Samsung	Yokogawa	Fresenius	Thermo Fisher	Lumexis	
Schlumberger Omnes	Thermo Fisher	Fujitsu	Toshiba	Mitsubishi	
Schneider Electric	ThyssenKrupp AG	GE Healthcare	Varian Medical	Mitsui Engineering	
Sharp Corporation	Tokyo Electron	Hitachi	<u>Aerospace/Other</u>	Northrop Grumman	
Shimadzu	Toshiba	Hologic	Airbus Group	Orbital ATK	
Siemens AG		Hospira	Augustawestland	Raytheon	
Smiths Group	<u>Medical</u>	Johnson & Johnson	BAE Systems	Rockwell Collins	
SolarWorld AG	3M Healthcare	Konica Minolta	Boeing	SAFRAN	
SOLOON SE	Abbott Labs	Life Technologies	Boeing Defense	Suzuki Motor	
SPX Corporation	Agilent	Masimo	Bombardier	Teledyne	
Sumitomo Heavy Industries	B. Braun	Medtronic	Chemring	Textron	
SunPower	Baxter International	Novartis	Embraer	Thales	
Suntech Power Holdings	Becton Dickinson	Olympus	Flight Display Systems	United Technologies	
Teradyne	Boston Scientific	Omron	General Dynamics	Yamaha	
Texas Instruments	C R Bard	Philips Electronics	General Electric	Rockwell Collins	
Textron, Inc.	Carl Zeiss Meditec	ResMed	Gogo LLC	SAFRAN	
	Cepheid	Roche		Suzuki Motor	

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