

***Now Available!***

---

# THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

***2017 Edition***

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

## **Report Highlights**

- **Worldwide Electronics Market Analysis, 2016–2021**
  - ◆ **60 Product Segments by Region and Supplier**
  - ◆ **Total Assembly Value (OEM, EMS and ODM)**
- **Worldwide EMS Market Analysis, 2016–2021**
  - ◆ **OEM vs. Outsourced (EMS and ODM Subcontract)**
  - ◆ **EMS, ODM, and OEM Production Market Share by Region, Market Segment, and Product (63 products and 920 manufacturing facilities)**
  - ◆ **Regional Manufacturing Distribution by 52 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 102)**

**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: (408) 904-5586

# The Worldwide EMS Market - 2017 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 has slowed, it still represents the most desired manufacturing model for the assembly of advanced electronics products available to OEM companies. The EMS industry declined approximately 1.1 percent in 2016 as a result of the slowing of sales for PCs (desktop, notebook and ultra).

**New Venture Research (NVR)** has followed this industry for over 24 years and is pleased to offer our latest update on this continually expanding market. Our report, *The Worldwide Electronics Manufacturing Services Market – 2017 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.

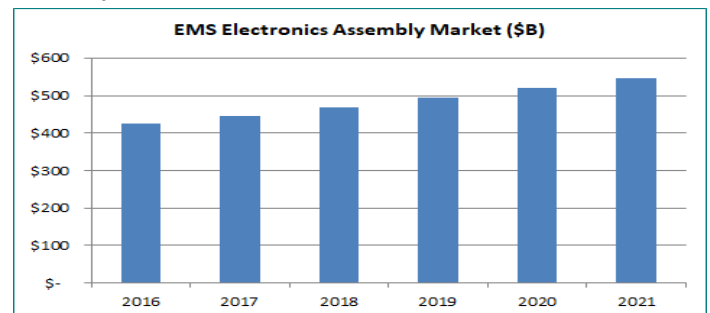
The report begins with an analysis of the worldwide electronics assembly market in terms of cost of goods sold, thus providing a baseline for the manufacturing value of electronics product assemblies. This forecast is checked against 63 individual product segments, including for the first time, The Internet of Things. The IoTs is looked at by industry segment (automotive, communications, computer/peripherals, consumer, industrial, medical, aviation and aerospace and defense industries) as well as applications in home, commercial and government. **NVR** estimates that total electronics assembly value was \$1.4 trillion in 2016 and will grow to approximately \$1.7 trillion in 2021. Fueled by the demand for EMS services, the contract manufacturing industry will grow from \$425 billion in 2016 to \$551 billion in 2021 - approximately at a 5.3 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 region. Third, the market opportunity for emerging growth is presented by product and country across 63 product segments and 916 manufacturing sites. No other report gives such detail by country wage rate and regional product assembly. The data 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 (102 companies—82 EMS and 20 ODM) 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, 2017 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 - 2017 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, 2016 - 2021

- 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 (6 product segments)
  - Internet of Things (11 product segments)

### Chapter 4: EMS Industry Structure, 2016

- 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 (53 Countries)
  - Americas (5 countries)
  - EMEA (30 countries)
  - APAC (18 countries)
- Industry Production by Market Share (63 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 (6 product segments)
  - Internet of Things (11 product segments)
- Worldwide EMS Supplier Market Share

### Chapter 5: Industry Forecast, 2016-2021

- 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/Country

### 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 52 Countries
- Summary Performance Rankings by Leading Supplier

### Chapter 7: Mergers and Acquisitions

- Past Activity, 2011 - 2016 - Largest and Best Deals by Year
- Acquisition Classes and Valuations - Methods
- Best OEM Divestment Opportunities by Region
- M/A activity in the IoT by OEM, EMS, ODM, OSAT and IDM

### Chapter 8: Company Profiles of Leading Suppliers

3CEMS	Global Brands Mfg.	Providence
Accton	GPV	Qisda
Alco Electronics	Hana Micro	Quanta
ALL CIRCUITS	HANZA Group	Sanmina
Alpha Networks	IEC Electronics	Scanfil
AmTRAN	IMI	Season Group
AsteelFlash	Inventec	Selcom
Benchmark	Jabil	Sercomm
Beyonics	Katek	Shenzhen Kaifa
BMK	Katolec	SigmaTron
CCS	KeyTronicEMS	SIIX
Celestica	Kimball	SMT Technologies
Cicor	Kitron	SMTC
Compal Electronics	LACROIX	Sparton Technology
Computime	Leesys	Sumitronics
Connect	Lite-On	Supermicro
Creation	MC ASSEMBLY	Suzhou Etron
DBG	Melecs	SVI
Delta Electronics	Micro-Star	Topscom
Di-Nikko	MITAC	TPV
Ducommun	NEO Technology	TQ Group
Elemaster	New Kinpo	TSMT
Elite Industrial	Neways	TT Electronics
ECS	Nippon Mfg.	UMC
Enics	Nortech Systems	USI
EOLANE	NOTE	Valuetronics
ESCATEC	OSE	Venture
Fabrinet	Pan-International	VIDEOTON
Fideltronik	PC Partner	V.S. Industry
Firstronic	PCI	VTech
Flex	Pegatron	Wistron
Foxconn-Hon Hai	PKC	WKK
Gemtek Technology	Plexus	Wong's
Gigabyte	Prettl	Zollner

# The Worldwide EMS Market - 2017 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, 2016–2021  
 Computer Products, 2016–2021  
 Communications Products, 2016–2021  
 Consumer Products, 2016–2021  
 Industrial Products, 2016–2021  
 Medical Products, 2016–2021  
 Automotive Products, 2016–2021  
 Commercial Aviation, Defense, Other Transportation Products, 2016–2021  
 Internet of Things, 2016–2021  
 Worldwide EMS Market, 2016–2021  
 Worldwide OEM Market by Mfg. Source, 2016–2021  
 Worldwide OEM Market by Industry Segment, 2016–2021  
 Worldwide EMS Market by EMS Size, 2016–2021  
 Key EMS Statistics by Company Size, 2016  
 Worldwide EMS Market by Region, 2016  
 Large EMS Manufacturing Facilities by Country, 2016  
 Worldwide EMS Market by Country, 2016  
 — 52 Countries/Regions  
 Worldwide EMS Market by Industry Segment, 2016  
 — 7 Market Segments, 60 Products  
 — EMS and ODM Rankings  
 EMS Market Share, 2016  
 ODM Market Share, 2016  
 Top Ten CM Market Share, 2016  
 Worldwide OEM Market by Industry Segment, 2021  
 Worldwide EMS Market by Company Size, 2016–2021  
 Worldwide EMS Market by Country and CAGR - 2016 and 2021

Worldwide Total Market by Country and CAGR - 2016 and 2021  
 Worldwide EMS Market by Region and Industry Segment, 2016–2021  
 Worldwide Total Market by Region and Industry Segment, 2016–2021  
 Worldwide EMS and Total Market by Product  
 — 60 Product Segments  
 — Forecasts from 2016 to 2021  
 Summary Financial Performance Metrics for Large Public EMS Companies, 2016  
 Key Financial Performance Metrics for Large Public EMS Companies, 2016  
 Worldwide EMS Margins by Industry Segment, 2016  
 EMS Companies by Revenue Growth Rate, 2011–2016  
 EMS Companies by Net Income, 2016  
 EMS Companies by Gross Margin, 2016  
 EMS Companies by Return on Assets, 2016  
 EMS Companies by Return on Equity, 2016  
 EMS Companies by Revenue per Employee, 2016  
 EMS Companies by Revenue per Square Foot, 2016  
 EMS Companies by Average Days Collection, 2016  
 EMS Companies by Inventory Turns, 2016  
 EMS Companies by Available Cash, 2016  
 EMS Companies by Debt to Equity, 2016  
 EMS Companies by 5-Year EPS Growth, 2016  
 Worldwide Performance Ranking for Leading EMS Companies, 2016  
 Worldwide EMS Wage Rates by Country, 2016  
 Merger and Acquisition Activity, 2011–2016  
 Leading Merger and Acquisition Activity by Company, 2011–2016  
 Average Merger and Acquisition Valuations by Company, 2011–2016

Publish Date July 2017 ~600 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, 2017 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: (408) 904-5586

www.newventureresearch.com; kwilliams@newventureresearch.com

Subtotal

Add Excel Spreadsheet of all tables (\$1000)

**TOTAL**