

Now Available!

THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

2018 Edition

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

Report Highlights

- **Worldwide Electronics Market Analysis, 2017–2022**
 - ◆ 62 Product Segments by Region and Supplier
 - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2017–2022**
 - ◆ OEM vs. Outsourced (EMS and ODM Subcontractors)
 - ◆ EMS, ODM, and OEM Production Market Share by Region, Market Segment, and Product (62 products and 900+ 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: (530) 265-2004

A Technology Market Research Company

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

The Worldwide EMS Market - 2018 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 experienced a burst in 2017, confirming that it is the most desired manufacturing model for the assembly of advanced electronics products available to OEM companies. The EMS industry increased approximately 10.7 percent in 2017 as a result of the growing of sales for advanced smartphone devices.

New Venture Research (NVR) has followed this industry for over 25 years and is pleased to offer our latest update on this continually expanding market. Our report, *The Worldwide Electronics Manufacturing Services Market – 2018 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.

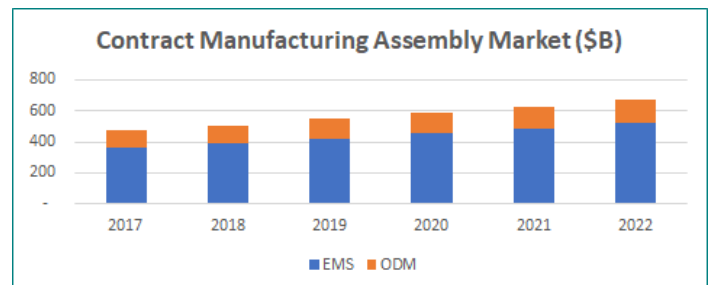
The report begins with an analysis of the worldwide electronics assembly market in terms of cost of goods sold, thus providing a baseline for the manufacturing value of electronics product assemblies. This forecast is checked against 62 individual product segments, including for the second time, The Internet of Things. The IoTs is looked at by industry segment (automotive, 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 \$1.5 trillion in 2017 and will grow to approximately \$1.7 trillion in 2022. Fueled by the demand for EMS services, the contract manufacturing industry will grow from \$471 billion in 2017 to \$675 billion in 2022 - approximately at a 7.5 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 62 product segments and 900+ 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—83 EMS and 19 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, 2018 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 - 2018 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, 2017 - 2022

- 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 (10 product segments)

Chapter 4: EMS Industry Structure, 2017

- 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 (62 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 (10 product segments)
- Worldwide EMS Supplier Market Share

Chapter 5: Industry Forecast, 2017-2022

- 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, 2012 - 2017 - 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	GPV	Prettl Electronics
Accton	Hana Micro	Providence
Alco Electronics	HANZA Group	Qisda
ALL CIRCUITS	IEC Electronics	Quanta Computer
AmTRAN	IMI	Sanmina
AsteelFlash	Inventec	Scanfil
Benchmark	Jabil	Season Group
Beyonics	Kaga Electronics	Selcom
BMK	Katek	SERCOMM
CCS	Katolec	Shenzhen Kaifa
Celestica	KeyTronicEMS	SigmaTron
Cicor	Kimball	SIIX
Compal Electronics	Kitron	SMT Technologies
Computime	LACROIX	SMTC
Connect	Leesys	Sparton Technology
Creation	Lite-On	Sumitronics
DBG	MC ASSEMBLY	Supermicro
Delta Electronics	Melecs	Suzhou Etron
Di-Nikko	Micro-Star	SVI
Ducommun	MITAC	Topscom
Elemaster	NEO Technology	TPV
Elite Industrial	New Kinpo Group	TT Electronics
ECS	Neways	UMC
Enics	Nippon Mfg.	USI
eolane	Norautron	Valuetronics
ESCATEC	Nortech Systems	Venture
Fabrinet	NOTE	Vexos
Fideltronik	Orbit One	VIDEOTON
Firstronic	OSE	V.S. Industry
Flex	Pan-International	VTech
Foxconn-Hon Hai	PC Partner	Wistron
Gemtek Technology	PCI	WKK
Gigabyte	Pegatron	Wong's
Global Brands Mfg.	Plexus	Zollner

The Worldwide EMS Market - 2018 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, 2017–2022
 Computer Products, 2017–2022
 Communications Products, 2017–2022
 Consumer Products, 2017–2022
 Industrial Products, 2017–2022
 Medical Products, 2017–2022
 Automotive Products, 2017–2022
 Commercial Aviation, Defense, Other Transportation Products, 2017–2022
 Internet of Things, 2017–2022
 Worldwide EMS Market, 2017–2022
 Worldwide OEM Market by Mfg. Source, 2017–2022
 Worldwide OEM Market by Industry Segment, 2017–2022
 Worldwide EMS Market by EMS Size, 2017–2022
 Key EMS Statistics by Company Size, 2017
 Worldwide EMS Market by Region, 2017
 Large EMS Manufacturing Facilities by Country, 2017
 Worldwide EMS Market by Country, 2017
 — 52 Countries/Regions
 Worldwide EMS Market by Industry Segment, 2017
 — 7 Market Segments, 62 Products
 — EMS and ODM Rankings
 EMS Market Share, 2017
 ODM Market Share, 2017
 Top Ten CM Market Share, 2017
 Worldwide OEM Market by Industry Segment, 2022
 Worldwide EMS Market by Company Size, 2017–2022
 Worldwide EMS Market by Country and CAGR - 2017 and 2022

Worldwide Total Market by Country and CAGR - 2017 and 2022
 Worldwide EMS Market by Region and Industry Segment, 2017–2022
 Worldwide Total Market by Region and Industry Segment, 2017–2022
 Worldwide EMS and Total Market by Product
 — 62 Product Segments
 — Forecasts from 2017 to 2022
 Summary Financial Performance Metrics for Large Public EMS Companies, 2017
 Key Financial Performance Metrics for Large Public EMS Companies, 2017
 Worldwide EMS Margins by Industry Segment, 2017
 EMS Companies by Revenue Growth Rate, 2012–2017
 EMS Companies by Net Income, 2017
 EMS Companies by Gross Margin, 2017
 EMS Companies by Return on Assets, 2017
 EMS Companies by Return on Equity, 2017
 EMS Companies by Revenue per Employee, 2017
 EMS Companies by Revenue per Square Foot, 2017
 EMS Companies by Average Days Collection, 2017
 EMS Companies by Inventory Turns, 2017
 EMS Companies by Available Cash, 2017
 EMS Companies by Debt to Equity, 2017
 EMS Companies by 5-Year EPS Growth, 2017
 Worldwide Performance Ranking for Leading EMS Companies, 2017
 Worldwide EMS Wage Rates by Country, 2017
 Merger and Acquisition Activity, 2012–2017
 Leading Merger and Acquisition Activity by Company, 2012–2017
 Average Merger and Acquisition Valuations by Company, 2012–2017

Publish Date July 2018 ~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, 2018 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: (530) 265-2004 Fax: (530) 265-1998

www.newventureresearch.com; info@newventureresearch.com

Subtotal

Add Excel Spreadsheet of all tables (\$1000)

TOTAL