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The Worldwide OEM Electronics Assembly Market - 2018 Edition

A Unique Database Providing Global Electronics Assembly Data for Nearly 380 OEM Companies

Database Highlights

■ **Product Segment Analysis, 2017**

- ◇ **Automotive**
- ◇ **Communications**
- ◇ **Computers/Peripherals**
- ◇ **Consumer Electronics**
- ◇ **Industrial**
- ◇ **Medical**
- ◇ **Aerospace/Military/Other Transportation**

■ **Company-Level Analysis, 2017**

- ◇ **COGS Assembly Revenue**
- ◇ **Electronics COGS Assembly Revenue**
- ◇ **Outsourced/In-House Assembly Revenue**
- ◇ **Assembly Revenue by 3 Regions**
- ◇ **Assembly Revenue by 48 Products**

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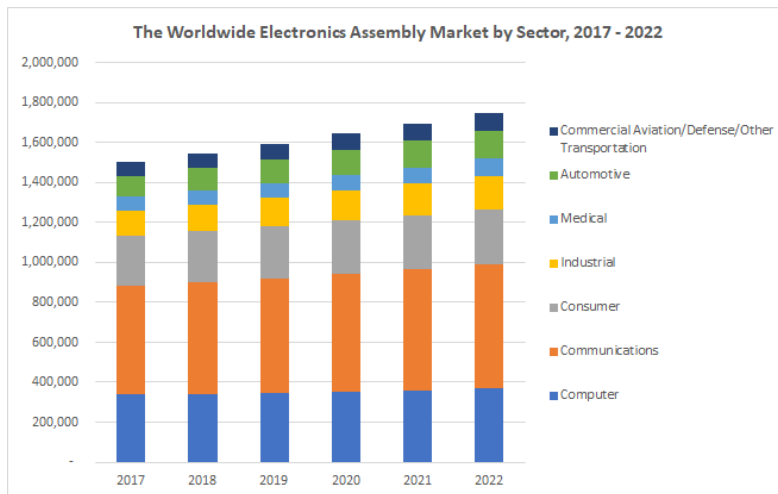
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The Worldwide OEM Electronics Assembly Market - 2018 Edition

Synopsis - 90 Page Word PP Discussion + 64 Excel Supporting Tables

The worldwide electronics assembly market is substantial in size, approximately \$1.5 trillion dollars in terms of cost of goods sold (COGS) as of 2017. The market is expanding rapidly but changing in composition both in terms of outsourcing partnerships and in-house manufacturing. Also, moves are being made annually with regard to the manufacturing country of origin based on total cost.



New Venture Research (NVR) has followed the electronics assembly industry for over 20 years with its research reports that focus on all aspects of this industry. **The Worldwide OEM Electronics Assembly Market - 2018 Edition** is a peerless database that analyzes the 2017 electronics assembly market on a worldwide basis. It is developed by studying nearly 380 leading OEM electronics companies in 48 different product categories and their manufacturing activities in 3 different geographic areas. Moreover, the report examines the electronics assembly market by outsourced subcontractor versus in-house assembly by the OEM company.

The report segments the worldwide electronics assembly value into seven unique markets.

Automotive
Communications
Computers/Peripherals
Consumer Electronics
Industrial
Medical
Aerospace/Military/Other Transportation

The following production data is given for the leading OEMs within each product/market segment.

COGS Assembly Revenue
Electronics COGS Assembly Revenue
Outsourced/In-Housed Assembly Revenue
Assembly Revenue by 3 Regions
Assembly Revenue by 48 Products

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

The Worldwide OEM Electronics Assembly Market - 2018 Edition will provide you with critical information you need on this significant market. The database/report is delivered by email as a single-user Excel file and sells for \$3,995. An extra single-user license is \$500 and a corporate license is \$1,500.

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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Synopsis - 90 Word Power Point Discussion + 64 Excel Supporting Tables

Worksheet 1: Automotive

- Automotive Engine Controls
- Automotive Instruments
- Automotive Safety
- Automotive Entertainment
- Total Automotive
- Automotive Summary

Worksheet 2: Communications

- Mobile Phones
- Infrastructure
- Other Phones
- Enterprise LANs
- Wireless LANs
- DSL/Cable Modems
- PBX/Key Systems
- Carrier-Class
- Other Communications
- Total Communications Summary

Worksheet 3: Computer/Peripherals

- Notebooks
- Desktops
- Tablets
- Servers
- Workstations
- ESS
- Monitors
- Printers
- E-Readers
- Other Computer
- Total Computer Summary

Worksheet 4: Consumer Electronics

- Analog TV
- Digital TV
- MP3
- Other Audio

Games

- Enterprise LANs
- Wireless LANs
- DSL/Cable
- PBX/CPE
- Class Carrier
- Other Telecom
- Total Telecom Summary

Worksheet 5: Industrial

- Process Control
- Test & Measurement
- Other Industrial
- Clean Energy
- Total Industrial Summary

Worksheet 6: Medical

- Monitoring
- Therapeutic
- Diagnostics/Surgical
- Total Medical Summary

Worksheet 7: Aerospace/Military/Other Transportation

- In-Flight Entertainment
- Navigation Systems
- Weapons
- C3 Systems
- Other Military
- Other Aerospace/Other Transportation
- Total Aerospace/Military/Other Transportation

Worksheet 8: World Total

- Total Production Assembly Value by Country
- EMS Assembly Value by Region
- In-House Assembly Value by Region
- Total Assembly Value by Market Segment/Product

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List of Companies Profiled

Automotive

Aisin Seiki
Alps Electric
Audi AG
AutoLiv
BMW
Calsonic Kansei
Chery Automobile
Continental
Daihatsu Motor
Daimler
Delphi
Denso Corporation
Dongfeng
Eaton
Fiat Chrysler
Hella
Hitachi
Hyundai Motor
Johnson Controls
JVC Kenwood
Kia Motors
Lear Corporation
Magna International
Mahindra
Mazda Motors
Mitsubishi Electric
Navistar
Nissan
Panasonic
Peugeot SA
Pioneer
Renault
Robert Bosch
Takata Corporation
Tata Motors
Valeo
Visteon
Volkswagen AG
Volvo AB

Communications

Accton
ADTRAN
Apple Computer

Communications (continued)

Arima Comm
Arista Networks
ARRIS
AsusTek
Avaya
Blackberry
Brocade Comm
China Putian
China SpaceSat
Ciena
Cisco Systems
Coriant
Datang Telecom
D-Link
ECI Telecom
Ericsson
Extreme Networks
F5 Networks
Fujitsu
Harmonic
Harris Corp.
Hewlett Packard Ent.
HTC
Huawei
Infinera
Juniper Networks
Kyocera
Lenovo
LG Mobile Com
Mitel
Motorola Solutions
NEC
Netgear
Nokia Oyj
Oki Electric
Oppo
Panasonic Mobile
Panda Electronics
Polycom
Qorvo
Quanta Computer
Samsung Electronics
Sanyo Electronics
Sony Mobile
Communications
Spirent
TCL
Telent
Tellabs
Toshiba

Communications (continued)

Ubiquiti
Viavi Solutions
Vivo
Vtech
Xiaomi
ZTE

Computers/Peripherals
Acer
Agfa-Gevaert
Amazon
Apple, Inc.
AsusTek
Barnes & Noble
Brother Industries
Canon
Cisco
Compal Electronics
Cray, Inc.
Dell Technologies
Delta Electronics
Diebold Nixdorf
EliteGroup Computer

Epson
Fuji Xerox
Fujitsu
Gemalto
Great Wall
Hannstar Display
Hewlett Packard
Hitachi
Hitachi Data
IBM
Intel
Inventec
Konica Minolta
Lenovo
Lexmark
Logitech
MicroStar
MiTac
NEC
NetApp, Inc.
Oracle

Computers/Peripherals (continued)

Pitney Bowes
Positivo Informatica
Qisda
Quanta Computer
Ricoh
Samsung Electronics
SanDisk
Sharp
Sony
Teradata
Toshiba
TPV
Unisys
Xerox

Consumer

Acer
Amtran
Apple
Arcelik
ARRIS Group
AU Optronics
Bang & Olufsen
Bosch Group
BOSE
Casio Computer
Changhong
Cisco Systems
Compal Electronics
Daewoo
Dolby Laboratories
EchoStar
Electrolux
Fitbit
Foxconn
Funai Electric
Garmin
General Electric
Haier Electronics
Harman International
Hisense
Hitachi
Humax

Consumer (continued)

JVC Kenwood
Koninklijke Philips
Konka Group
LG Electronics
Microsoft
Midea Holding
Mitsubishi Electric
Nikon
Nintendo
Olympus
Panasonic
Pioneer
Qisda
Quanta Computer
Roku
Roland Corp.
Samsung
SmarDTV (Nagra)
Sony
Tatung
TCL Corporation
Technicolor
TomTom
Toshiba
TPV
Trimble Navigation
Vestel
Whirlpool
Yamaha

Industrial

ABB
Abengoa
Advantest
Agilent
ALSTOM
Anritsu
Applied Materials
ASML
Bharat Heavy
Electricals
Canadian Solar
Caterpillar
Changzhou Trina
Solar

Industrial (continued)

Cisco Systems
CNH Global
Coherent
Cree
Danaher
Deere & Co.
Diebold
Eaton
Ebara Corp.
Electrolux
Emerson
Everi Holdings
Exide Technologies
Fanuc
Federal Signal
FEI Company
First Solar
Fronius International
Fuji Electric
Fujitsu
Gamesa
GE Industrial
Gemalto
General Dynamics
Haier
Halliburton
Hanwha Q-Cells
Hitachi
Honeywell
IGT
Illumina
Ingersoll Rand
Itron
ITT Corp.
JEOL
Johnson Controls
Keysight
Technologies
KLA-Tencor
Komatsu
KONE Oyj
Lam Research
Lennox Intl.
LG Electronics
Mettler Toledo

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List of Companies Profiled

<u>Industrial (continued)</u>	<u>Industrial (continued)</u>	<u>Medical</u>	<u>Medical (continued)</u>	<u>Aerospace/Other</u>	<u>Aerospace/Other (continued)</u>
Mitsubishi Electric	Shimadzu	3M Healthcare	Konica Minolta	Airbus SE	
MKS Instruments	Siemens AG	Abbott Labs	Masimo	Aptiv	Lufthansa Systems
MTS Systems	Smiths Group	Agilent	Medtronic	BAE Systems	Mitsubishi
National Instruments	SPX Corporation	Amgen	Novartis	Boeing	Mitsui Engineering
NCR	Sumitomo Heavy Industries	AstraZeneca	Omron	Boeing Defense	Mitsui Engineering
NEC	SunPower	B. Braun	Philips Electronics	Bombardier	Northrop Grumman
Nichia	Teradyne	Baxter International	Qiagen N.V.	Chemring	Orbital ATK
Omron	Texas Instruments	Beckman Coulter	ResMed	Dassault Aviation	Orbital ATK
OSRAM Licht	Textron, Inc.	Becton Dickinson	Roche	Embraer	Raytheon
Panasonic Lighting	Thermo Fisher	Bio-Rad	Siemens Healthcare	Esterline	Rockwell Collins
Parker-Hannifin	ThyssenKrupp AG	Boston Scientific	Smiths & Nephew	General Dynamics	Rockwell Collins
PerkinElmer	Tokyo Electron	Carl Zeiss Meditec	Smiths Group	General Electric	Saab
Robert Bosch	Toshiba	CONMED	Stryker	Gogo LLC	SAFRAN
Rockwell Automation	UTC	DaVita Healthcare	Sun Pharmaceuticals	Gulfstream	SAFRAN
Rohde & Schwartz	Vestas Wind	Dentsply	Synthes	Hindustan Aerospace	Suzuki Motor
Samsung	Waters	Dragerwerk	Terumo	Honda Motor	Suzuki Motor
Schlumberger Omnes	Whirlpool Corporation	Edwards Lifesciences	Thermo Fisher	Honeywell	Teledyne
Schneider Electric	Yokogawa	Fresenius	Toshiba	Israel Aerospace	Teledyne
Sharp Corporation		Fujitsu	Varian Medical	Kawasaki	Thales
		GE Healthcare	Zimmer Biomet	L-3	Thales
		Hitachi		Leonardo	United Technologies
		Hologic		Lockheed Martin	United Technologies
		Johnson & Johnson		Yamaha	Yamaha

Published August 2018 - 64 Excel Tables, 90 Word Reports

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TOTAL

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Sample of Industry Analysis, Automotive Entertainment Systems, 2017

The following tables illustrate the report side of this product of which the Excel database is the primary source. Examples of product/industry results by product category are provided along with key trend analyses by market sector by leading OEM company in this 90 page written addendum report. In addition, a worldwide OEM industry forecast is provided by individual product category and industry sector which take into account competing products and technologies.

Company	Prod. Total	Americas	EMEA	APAC	EMS Total	Americas	EMEA	APAC	L+H Total	Americas	EMEA	APAC
Daimler												
Volkswagen AG												
Robert Bosch												
Audi AG												
BMW												
Volvo AB												
Nissan												
Panasonic												
Kia Motors												
Renault												
Alps Electronics												
Hitachi												
Visteon												
Pioneer												
Delphi												
Hyundai Motor												
Aisin Seiki												
JVC Kenwood												
Peugeot SA												
Dongfeng												
Tata Motors												
Mazda Motors												
Chery Automobile												
Navistar												
Fiat Chrysler												
Mahindra												
Top Entertainment Total	12,385	1,976	5,255	5,154	4,119	784	1,993	1,342	8,266	1,191	3,263	3,812
Others	8,688	1,303	3,686	3,698	4,016	333	1,032	2,650	4,672	970	2,654	1,048
Percent	41.20%	15.00%	42.40%	42.60%	49.40%	8.30%	48.40%	66.00%	36.10%	20.80%	56.80%	22.40%
Total Revenue	21,073	3,279	8,941	8,853	8,135	1,117	3,025	3,993	12,939	2,161	5,917	4,860

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Sample of Industry Analysis, Communications Mobile Phones, 2017

Company	Prod. Cell	Ameri cas	EMEA	APAC	EMS Cell HS	Ameri cas	EMEA	APAC	I-H Cell HS	Ameri cas	EMEA	APAC
Samsung Electronics												
Apple Computer												
Xiaomi												
Huawei												
LG Mobile Com												
Lenovo												
Panda Electronics												
TCL												
Sony Mobile Communications												
Toshiba												
ZTE												
Quanta Computer												
HTC												
Sanyo Electronics												
Oppo												
Vivo												
Panasonic Mobile Comm												
NEC												
Asus Tek												
Blackberry												
Fujitsu												
Kyocera												
China SpaceSat												
Top Cell Phone Total	249,747	33,055	21,902	194,791	97,923	1,201	817	95,905	151,824	31,853	21,085	98,886
Others	135,391	40,617	28,208	66,566	14,517	4,587	8,984	945	120,874	36,030	19,224	65,620
Total Revenue	385,138	73,672	50,110	261,356	112,440	5,789	9,801	96,850	272,698	67,883	40,309	164,506

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Sample of Industry Analysis, Computer Servers, 2017

Company	Product ion	Ameri cas	EMEA	APAC	EMS Total	Ameri cas	EMEA	APAC	I-H Total	Ameri cas	EMEA	APAC
HPE												
Dell Technologies												
IBM												
Cisco												
Samsung Electronics												
Intel												
Lenovo												
Quanta Computer												
Sony												
Toshiba												
Fujitsu												
Oracle												
Acer												
NEC												
Ricoh												
Unisys												
Inventec												
Positivo Informatica												
HP, Inc.												
Top Server Total	27,990	6,127	4,745	17,119	19,817	5,301	4,209	10,307	8,173	826	536	6,812
Others	36,577	7,315	6,584	22,678	4,087	675	572	2,840	32,490	6,641	6,012	19,838
Total Revenue	64,568	13,442	11,328	39,797	23,904	5,976	4,781	13,147	40,663	7,466	6,548	26,650

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Sample of Industry Analysis, Consumer Digital TVs, 2017

Company	Prod. Total	Americas	EMEA	APAC	EMS Total	Ameri cas	EMEA	APAC	I-H Total	Ameri cas	EMEA	APAC
Sony												
LG Electronics												
Quanta Computer												
Foxconn												
Midea Holding												
TPV												
Panasonic												
Mitsubishi Electric												
Samsung												
TCL Corporation												
Compal Electronics												
AU Optronics												
Qisda												
Changhong												
Hitachi												
Toshiba												
Konka Group												
Tatung												
Hisense												
Acer												
Daewoo												
Funai Electric												
Amtran												
Haier Electronics												
Vestel												
Top Digital TV Total	61,826	3,716	3,857	54,252	17,505	2,200	2,065	13,240	44,321	1,516	1,792	41,013
Others	10,449	628	596	9,226	8,107	569	523	7,015	2,342	59	73	2,210
Total Revenue	72,275	4,344	4,453	63,478	25,612	2,769	2,588	20,255	46,663	1,575	1,865	43,223

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Sample of Industry Analysis, Medical Diagnostic Systems, 2017

<u>Company</u>	<u>Prod. Total</u>	<u>Ameri cas</u>	<u>EMEA</u>	<u>APAC</u>	<u>EMS Total</u>	<u>Ameri cas</u>	<u>EMEA</u>	<u>APAC</u>	<u>I-H Total</u>	<u>Ameri cas</u>	<u>EMEA</u>	<u>APAC</u>
GE Healthcare												
Johnson & Johnson												
Roche												
Siemens Healthcare												
Philips Electronics												
Hitachi												
Toshiba												
Fresenius												
DaVita Healthcare												
Medtronic												
Becton Dickinson												
Thermo Fisher												
Baxter International												
Fujitsu												
Agilent												
Beckman Coulter												
B. Braun												
Varian Medical												
Hologic												
Bio-Rad												
Abbott Labs												
Terumo												
Dragerwerk												
Konica Minolta												
Qiagen N.V.												
Smiths Group												
Carl Zeiss Meditec												
Top Diagnostics Total	12,716	5,630	3,200	3,886	4,644	1,838	1,256	1,550	8,072	3,792	1,944	2,336
Others	18,344	8,122	1,834	8,388	5,986	1,264	507	4,214	12,358	6,857	1,327	4,174
Total Revenue	31,060	13,751	5,035	12,274	10,630	3,103	1,763	5,764	20,429	10,649	3,271	6,510

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Sample of Industry Analysis, Aerospace Flight Navigation Systems, 2017

Company	Prod. Total	Ameri cas	EMEA	APAC	EMS Total	Ameri cas	EMEA	APAC	I-H Total	Ameri cas	EMEA	APAC
Raytheon												
Airbus SE												
Boeing												
Northrop Grumman												
Lockheed Martin												
SAFRAN												
United Technologies												
Honeywell												
Dassault Aviation												
BAE Systems												
General Dynamics												
Saab												
Aptiv												
Gulfstream												
Rockwell Collins												
Esterline												
Bombardier												
Teledyne												
Thales												
Textron												
Orbital ATK												
Leonardo												
Hindustan Aerospace												
Israel Aerospace												
Embraer												
Top Flight Navigation Total	17,056	9,817	5,634	1,606	4,722	3,136	1,209	377	12,334	6,681	4,425	1,229
Others	1,767	707	530	530	911	455	46	410	856	251	485	120
Total Revenue	18,823	10,523	6,164	2,136	5,633	3,591	1,255	787	13,191	6,932	4,909	1,349

