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THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

2025 Edition

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

Report Highlights

- **Worldwide Electronics Market Analysis, 2024–2029**
 - ◆ 46 Product Segments by Region and Supplier
 - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2024–2029**
 - ◆ OEM vs. Outsourced (EMS and ODM Subcontractors)
 - ◆ EMS, ODM, and OEM Production Market Share by Region, Market Segment, and Product (46 products and 900+ manufacturing facilities)
 - ◆ Regional Manufacturing Distribution by 57 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 (Best Performing EMS and ODM Companies from \$100+ Million - Total 100)**

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

The Worldwide EMS Market - 2025 Edition

Synopsis

The worldwide electronics manufacturing services (EMS) market is a determining force in production of electronics products and in 2024 accounted for 45 percent of all assembly completed. Outsourcing grew negatively in 2023 from the previous year, as a result of an economic downturn in the computer and communication industries. This resulted in an industry downturn of approximately 5.2 percent in 2024. Both EMS and ODMs endured equally, particularly those serving the top tier.

New Venture Research (NVR) has followed this industry for 30 years and is pleased to offer its latest update on this continually expanding market. Our report, *The Worldwide Electronics Manufacturing Services Market – 2025 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 products and countries.

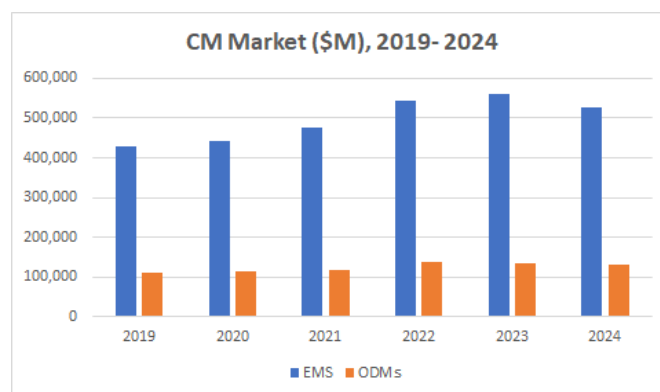
The report begins with an analysis of the worldwide electronics assembly market, giving a baseline for the manufacturing value of electronics product assemblies. A forecast is checked against 46 individual product segments which make up the majority of electronics assembly (automotive, communications, computer, consumer, industrial, medical, aviation and aerospace and defense industries). Some segments such as transportation and industrial remain strong sources for outsourcing demand. NVR estimates that total electronics assembly value (OEM+EMS+ODM) was \$1.6 trillion in 2024 and will grow to approximately \$2.2 trillion in 2029 at a CAGR of 6.3 percent, mostly fueled by the demand for comprehensive EMS services.

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 46 individual products. 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 the 46 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 (100 companies—82 EMS and 18 ODM) from all over the world. These reviews summarize the market focus and value-proposition of each company, describing 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 EMS industry participants.



The Worldwide Electronics Manufacturing Services Market, 2025 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 copy 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 30 years' experience in technology and business research. He began his career as a telecom systems engineer and went on to hold several market research analyst and management positions with companies such as Creative Strategies, Frost and Sullivan, and BIS Strategic Decisions. He earned his undergraduate degree in Astrophysics and holds an MSEE from the University of Colorado and an MBA from the Edinburgh School of Business.

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AmTRAN	HANZA Group	Quanta Computer
ATA IMS Berhad	Hi-Mix Elect.	Sanmina
Benchmark	IMI	Scanfil
Bitron	Inventec	Season Group
BMK	Jabil	SERCOMM
BYD Electronics	Kaga Electronics	Shenzhen Zowee
Celestica	Kaifa	SigmaTron
Cicor	Katolec	SIIX
Compal Electronics	Keytronic	SKP Resources
Computime	Kimball	SMTC
Connect	Kitron	Spartronics
Creation	LACROIX	Sumitronics
Cyient Ltd.	Lite-On	SVI
DBG Holdings	Luxshare	Syrma SGS
Delta Electronics	Mack Technologies	TPV
Di-Nikko	Melecs	TQ-Systems
Dixon Technologies	Micro-Star	TT Electronics
Ducommun	MiTAC	UMC
East West Mfg.	NEO Technology	USI
Elemaster	New Kinpo Group	Variosystems
ECS	Neways	Valuetronics
eolane	Nippon Mfg.	Venture
ESCATEC	Norautron	Vexos
Etron Technologies	Nortech Systems	VIDEOTON
Fabrinet	NOTE	VIRTEX
Fideltronik	OSE	V.S. Industry
Flex	Pan-International	Vtech EMS
Foxconn(Hon Hai)	PC Partner	Wistron
Gemtek Technology	PCI, Ltd.	WKK
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New Venture Research Corp.

337 Clay St., Suite 101

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Tel: (530) 265-2004

www.newventureresearch.com; info@newventureresearch.com

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