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# The Worldwide OEM Electronics Assembly Market - 2020 Edition

**A Unique Database Providing Global Electronics Assembly Data of Nearly 390 of the World's Leading OEM Outsourcing Companies**

## Database Highlights

### ■ Product Segment Analysis, 2019

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

### ■ Company-Level Analysis, 2019

- ◆ 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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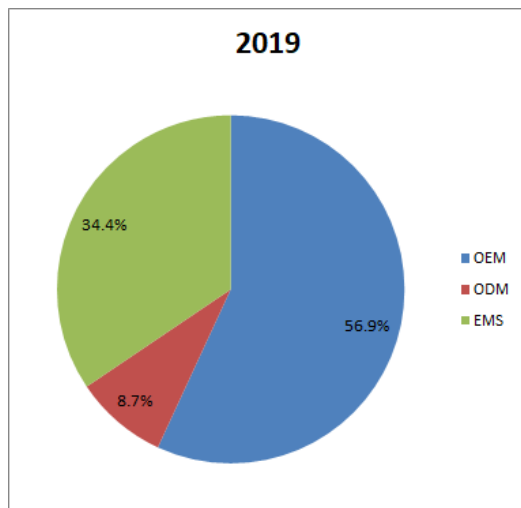
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# The Worldwide OEM Electronics Assembly Market - 2020 Edition

## Synopsis - 68 Page PP Discussion + 64 Excel Supporting Tables

The worldwide electronics assembly market is substantial in size, approximately \$1.3 trillion dollars in terms of cost of goods sold (COGS) as of 2019. The market has been expanding rapidly but changing in composition both in terms of outsourcing partnerships with 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 25 years with its research reports that focus on all aspects of this industry. **The Worldwide OEM Electronics Assembly Market - 2020 Edition** is a peerless database that analyzes the 2019 electronics assembly market on a worldwide basis. It is developed by studying nearly 390 leading OEM electronics companies in 46 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 46 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 - 2020 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 25 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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### Worksheet 1: Automotive

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

- Games
- Set-Top Boxes
- Digital Cameras
- DVD/DVR
- Camcorders
- Other Consumer
- Total Consumer 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 5: Industrial

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

### Worksheet 3: Computer/Peripherals

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

### Worksheet 6: Medical

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

### Worksheet 4: Consumer Electronics

- Digital TV
- MP3/4
- Smart Home and Other Audio
- Games

### 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

# The Worldwide OEM Electronics Assembly Market - 2020 Edition

## List of Companies Profiled

| <u>Automotive</u>   | <u>Communications</u> | <u>Communications (continued)</u> | <u>Computers/Peripherals (continued)</u> | <u>Consumer (continued)</u> | <u>Industrial</u>        |
|---------------------|-----------------------|-----------------------------------|--|-----------------------------|--------------------------|
| Aisin Seiki         | Accton                |                                   | HP, Inc.                                 | Compal Electronics          | ABB                      |
| Alps Electronics    | ADTRAN                | Panasonic Mobile Comm             | HPE                                      | Dolby Laboratories          | Advantest                |
| Audi AG             | ADVA                  | Panda Electronics                 | HTC                                      | EchoStar                    | Agilent                  |
| Autoliv             | Allied Telesis        | Polycom (now Poly)                | Huawei                                   | Electrolux                  | ALSTOM                   |
| Beijing Auto        | Apple                 | Qorvo                             | IBM                                      | Fitbit                      | Anritsu                  |
| BMW                 | Arista Networks       |                                   | Intel                                    | Funai Electric              | Applied Materials        |
| Changan Motor       | AsusTek               | Quanta Computer                   | Inventec                                 | Garmin                      | ASML                     |
| Continental AG      | Avaya                 | Samsung Electronics               | Konica Minolta                           | General Electric            | Bharat Heavy Electricals |
| Daimler             | BBK Electronics       | Sanyo Electronics                 | Lenovo                                   | Google                      | Caterpillar              |
| Delphi              | Blackberry            | Spirent                           | Logitech                                 | Great Wall Technology       | Cisco Systems            |
| Denso Corporation   | China Putian          | TCL Electronics                   | MicroStar                                | Haier Electronics           | CNH Global               |
| Dongfeng            | China SpaceSat        | Telent                            | MiTac                                    | Hisense                     | Coherent                 |
| Eaton               | Ciena                 | Tellabs                           | NEC                                      | Hitachi                     | Cree                     |
| FAW Group           | Cisco Systems         | Toshiba                           | NetApp, Inc.                             | Humax                       | Danaher                  |
| Fiat Chrysler       | CommScope             | Ubiquiti Networks                 | Oracle                                   | JVC Kenwood                 | Deere & Co.              |
| Geely Motor         | D-Link                |                                   | Pitney Bowes                             | Koninklijke Philips         | Diebold                  |
| Guangzhou Auto      | Datang Telecom        | <u>Computers/Peripherals</u>      | Positivo Informatica                     | Konka Group                 | Eaton                    |
| Hella KG&A          | Dell Technologies     | Acer                              | Qisda                                    | LG Electronics              | Ebara Corp.              |
| Hitachi             | ECI Telecom           | Agfa-Gevaert                      | Quanta Computer                          | Microsoft                   | Electrolux               |
| Honda Corporation   | Ericsson              | Amazon                            | Ricoh                                    | Midea Holding               | Emerson                  |
| Hyundai Motor       | Extreme Networks      | Apple, Inc.                       | Samsung Electronics                      | Mitsubishi Electric         | Everi Holdings           |
| Johnson Controls    | F5 Networks           | AsusTek                           | Sony                                     | Nikon                       | Fanuc                    |
| JVC Kenwood         | Fortinet              | Barnes & Noble                    | Teradata                                 | Nintendo                    | Federal Signal           |
| Kia Motors          | Fujitsu               | Brother Industries                | Toshiba                                  | Olympus                     | FirstSolar               |
| Magna International | Google                | Canon                             | TPV                                      | Panasonic                   | Fuji Electric            |
| Mahindra            | Harmonic              | Cisco                             | Unisys                                   | Pioneer                     | Fujitsu                  |
| Maruti Suzuki       | Harris Corp.          | Clevo                             | Western Digital                          | Qisda                       | Gamesa (Siemens)         |
| Mazda Motors        | HPE                   | Compal Electronics                | Xerox                                    | Quanta Computer             | GE Industrial            |
| Mitsubishi Motors   | HTC                   | Dell Technologies                 | <u>Consumer</u>                          | Roku                        | Gemalto (Thales)         |
| Navistar            | Huawei                | Delta Electronics                 | Acer                                     | Samsung                     | General Dynamics         |
| Nissan              | Infinera              | Diebold Nixdorf                   | Alibaba                                  | Skyworth                    | Haier                    |
| Panasonic           | Juniper Networks      | EliteGroup Computer Sys           | Amazon                                   | SmarDTV (Nagra)             | Halliburton              |
| Peugeot SA          | Kyocera               | Epson                             | Amtran                                   | Sony                        | HiSilicon (Hauwei)       |
| Pioneer             | Lenovo                | Fuji Xerox                        | Apple                                    | Tatung                      | Hitachi                  |
| Renault             | LG Mobile Com         | Fujitsu                           | Arcelik                                  | TCL Electronics             | Honeywell                |
| Robert Bosch        | Mitel                 | Gemalto                           | AU Optronics                             | Technicolor                 | IGT                      |
| SAIC Motor          | Motorola Solutions    | Google                            | BOE Technology                           | TomTom                      | Illumina                 |
| Tata Motors         | NEC                   | Great Wall                        | Bosch Group                              | Toshiba                     | Ingersoll Rand           |
| Tesla               | Netgear               | Hannstar Display                  | BOSE                                     | TPV                         | Itron                    |
| Valeo               | Nokia Oyj             | Hitachi Vantara                   | Casio Computer                           | Trimble Navigation          | ITT Corp.                |
| Visteon             | Ok Electric           |                                   | Changhong                                | Whirlpool                   |                          |
| Volkswagen AG       |                       |                                   | Cisco Systems                            | Yamaha                      |                          |
| Volvo AB            |                       |                                   | Commscope                                |                             |                          |

# The Worldwide OEM Electronics Assembly Market - 2020 Edition

## List of Companies Profiled

| <u>Industrial (continued)</u> | <u>Industrial (continued)</u> | <u>Medical</u>       | <u>Medical (continued)</u> | <u>Aerospace/Defense</u> | <u>Aerospace/Other (continued)</u> |
|-------------------------------|-------------------------------|----------------------|----------------------------|--------------------------|------------------------------------|
| ITT Corp.                     | Rohde & Schwartz              | 3M Healthcare        | Masimo                     | Airbus SE                |                                    |
| JA Solar                      | Samsung                       | Abbott Labs          | Medtronic                  | AVIC International       | Leonardo                           |
| JEOL                          | Schlumberger Omnes            | Agilent              | Mindray Medical            | BAE Systems              | Lockheed Martin                    |
| JinkoSolar                    | Schneider Electric            | Amgen                | Novartis                   | Boeing                   | Lufthansa Systems                  |
| Johnson Controls              | Shimadzu                      | AstraZeneca          | Omron                      | Boeing Defense           | Mitsubishi                         |
| Keysight Technologies         | Siemens AG                    | B. Braun             | Philips Electronics        | Bombardier               | Mitsui Engineering                 |
| KLA-Tencor                    | Sinopec                       | Baxter International | Qiagen N.V.                | Chemring                 | Northrop Grumman                   |
| Komatsu                       | SMIC                          | Becton Dickinson     | ResMed                     | China Aerospace          | Orbital UAV                        |
| KONE Oyj                      | Smiths Group                  | Bio-Rad              | Roche                      | China Electronics Corp.  | Raytheon                           |
| Lam Research                  | SPX Corporation               | Boston Scientific    | Siemens Healthcare         | Dassault Aviation        | SpaceX                             |
| Lennox Intl.                  | Sumitomo Heavy Industries     | Carl Zeiss Meditec   | Smith & Nephew             | Embraer                  | Saab                               |
| LG Electronics                | SunPower                      | CONMED               | Smiths Group               | General Dynamics         | SAFRAN                             |
| LONGi                         | Teradyne, Inc.                | Danaher              | Stryker                    | General Electric         | Suzuki Motor                       |
| Mettler Toledo                | Texas Instruments             | DaVita Healthcare    | Sun Pharmaceuticals        | Hindustan Aerospace      | Teledyne                           |
| Mitsubishi Electric           | Textron, Inc.                 | Dentsply Sirona      | Terumo                     | Honda Motor              | Textron                            |
| MKS Instruments               | Thermo Fisher Scientific      | Dragerwerk           | Thermo Fisher              | Honeywell                | Thales                             |
| MTS Systems                   | ThyssenKrupp AG               | Edwards Lifesciences | Toshiba                    | Israel Aerospace         | United Technologies                |
| National Instruments          | Tokyo Electron                | Fresenius            | Varian Medical             | Kawasaki                 | Yamaha Motors                      |
| NCR                           | Toshiba                       | Fujitsu              | Zimmer Biomet              | L3Harris                 |                                    |
| NEC                           | Trina Solar                   | GE Healthcare        | Terumo                     |                          |                                    |
| Nichia                        | UTC                           | Hitachi              | Thermo Fisher              |                          |                                    |
| Omron                         | Vestas Wind                   | Hologic              | Toshiba                    |                          |                                    |
| OSRAM Licht                   | Waters Corporation            | Johnson & Johnson    | Varian Medical             |                          |                                    |
| Panasonic Lighting            | Whirlpool Corporation         | Konica Minolta       | Zimmer Biomet              |                          |                                    |
| Parker-Hannifin               | Yingli                        |                      |                            |                          |                                    |
| PerkinElmer                   | Yokogawa Electric             |                      |                            |                          |                                    |
| Q-Cells (Hanwha)              |                               |                      |                            |                          |                                    |

Published August 2020 - 64 Excel Tables, 68 Page PP Discussion

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**TOTAL**

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## Sample of Industry Analysis, Automotive Entertainment Systems, 2019

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 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 | I-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                       |             |          |      |      |           |          |      |      |           |          |      |      |
| <b>Top Entertainment Total</b> |             |          |      |      |           |          |      |      |           |          |      |      |
| Others                         |             |          |      |      |           |          |      |      |           |          |      |      |
| Percent                        |             |          |      |      |           |          |      |      |           |          |      |      |
| <b>Total Revenue</b>           |             |          |      |      |           |          |      |      |           |          |      |      |















