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# The Worldwide OEM Electronics Assembly Market - 2023 Edition

**A Unique Database Providing Global Electronics Assembly Data of 381 of the World's Leading OEM Outsourcing Companies**

## Database Highlights

### ■ Product Segment Analysis, 2022

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

### ■ Company-Level Analysis, 2022

- ◇ COGS Assembly Revenue
- ◇ Electronics COGS Assembly Revenue
- ◇ Outsourced/In-House Assembly Revenue
- ◇ Assembly Revenue by 3 Regions
- ◇ Assembly Revenue by 46 Products

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# The Worldwide OEM Electronics Assembly Market - 2023 Edition

## Synopsis - 70 Page PP Discussion + 64 Excel Supporting Tables

The worldwide electronics assembly market is substantial in size, approximately \$1.4 trillion dollars in terms of cost of goods sold (COGS) as of 2022. 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.

Worldwide Electronics Market by Source and Industry, 2022

<u>Total Assembly (\$M)</u>	<u>EMS</u>	<u>ODM</u>	<u>OEM</u>	<u>Total</u>
Computer	131,037	73,524	131,102	335,663
Communications	211,119	26,452	306,270	543,842
Consumer	92,671	29,301	70,983	192,955
Industrial	45,362	2,119	79,903	127,384
Medical	30,621	881	21,566	53,068
Automotive	29,918	1,050	61,375	92,343
Aviation/Defense/ Other	20,368	0	50,729	71,097
<b>Total</b>	<b>561,096</b>	<b>133,328</b>	<b>721,928</b>	<b>1,416,352</b>

**New Venture Research (NVR)** has followed the electronics assembly industry for over 30 years with its research reports that focus on all aspects of this industry. This report is a peerless database that analyzes the 2022 electronics assembly market on a worldwide basis. It is developed by studying 381 leading OEM electronics companies in 46 different product categories and their manufacturing activities in 3 different geographic regions. 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 - 2023 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 systems 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, Scotland.

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## Synopsis - 70 Page PP Discussion and Excel Supporting Tables

### Worksheet 1: Automotive

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

- 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/CPE Systems
- Carrier-Class
- Other Communications
- Total Communications 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 3: Computer/Peripherals

- Notebooks
- Desktops
- Tablets/E-readers
- Servers
- Workstations
- ESS
- Monitors
- Printers
- E-Readers
- Other Computer
- Total Computer 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 4: Consumer Electronics

- Digital TV
- MP3/4
- Smart Home/AV/Wearables
- Games

### Worksheet 8: World Total

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

# The Worldwide OEM Electronics Assembly Market - 2023 Edition

## List of Companies Analyzed

<u>Automotive</u>	<u>Communications</u>	<u>Communications (continued)</u>	<u>Computers/Peripherals (continued)</u>	<u>Consumer (continued)</u>	<u>Consumer (continued)</u>
Aisin Seiki	Accton	Palo Alto Networks	HPE	BOSE Corporation	Toshiba
Alps Electric	ADTRAN	Panasonic Mobile Comm	Huawei	Casio Computer	TPV
Audi AG	China Tower	Panda Electronics	IBM	Changhong	Trimble, Inc.
AutoLiv	Apple	Plantronics	Seagate	Cisco Systems	Whirlpool
BAIC Motor	Arista Networks	Qorvo	Intel	CommScope	Yamaha
Beijing Auto	AsusTek	Quanta Computer	Inventec	Compal Electronics	<u>Industrial</u>
BMW	Avaya	Orange SA	Konica Minolta	Dolby Laboratories	ABB
Changan Motor	BBK Electronics	Ribbon Communications	Lenovo	EchoStar	Advantest
Continental	NTT DoCoMo	Samsung Electronics	Logitech	Electrolux	Agilent
Daimler	China SpaceSat	Spirent	Micro-Star	Fitbit, Inc.	ALSTOM
Delphi Technology	Ciena	TCL Electronics	MiTac	Founder	Anritsu
Denso Corporation	Cisco Systems	Telia	NEC	Funai Electric	Applied Materials
Dongfeng	CommScope	Cobham SATCOM	NetApp, Inc.	Garmin	ASML
Eaton Corp.	Datang Telecom	Toshiba	Oracle	General Electric	Bharat Heavy Electricals
FAW Group	Dell Technologies	Ubiquiti Networks	Pitney Bowes	Google	Bozhong Precision
Geely Motor	D-Link	UTStarcom	Positivo Informatica	Haier Electronics	Caterpillar
Guangzhou Auto	Ericsson	Viavi Solutions	Qisda	Hisense	Cisco Systems
Hella	Extreme Networks	Vtech	Quanta Computer	Hitachi	CNH Industrial
Hitachi	F5, Inc.	Xiaomi	Ricoh	Humax	Coherent
Honda Motor Corp.	FiberHome	ZTE	Samsung Electronics	JVC Kenwood	Danaher
Hyundai Motor	Fortinet	<u>Computers/Peripherals</u>	Sony	Koninklijke Philips	Deere & Co.
Johnson Controls	Fujitsu	Acer	Supermicro	Konka Group	Diebold
JVC Kenwood	Google	Agfa-Gevaert	Teradata	LG Electronics	Eaton
Kia Corp.	Harmonic	Amazon	Tongfang	Microsoft	Ebara Corp.
Magna International	Hewlett Packard Enterprise	Apple, Inc.	Toshiba	Midea Holding	Electrolux
Mahindra & Mahindra	Huawei	AsusTek	TPV	Mitsubishi Electric	Emerson
Maruti Suzuki	Infinera	Brother Industries	Unisys	Nikon	Everi Holdings
Mazda Motors	Juniper Networks	Canon	Western Digital	Nintendo	Fanuc
Mitsubishi Motors	Keysight Technologies	Cisco	Xerox	Olympus	Federal Signal
Navistar International	Kyocera	Compal Electronics	Zebra Technologies	Panasonic	First_Solar
Nissan	Harris Technology Group	Dell Technologies	<u>Consumer</u>	Qisda	Fuji Electric
Panasonic	Lenovo	Delta Electronics	Acer	Quanta Computer	Fujitsu
Renault	LG Mobile Com	Diebold Nixdorf	Alibaba	Roku	GE Industrial
Robert Bosch	Blackberry	ECS	Amazon	Samsung	General Dynamics
SAIC Motor	Motorola Solutions	Epson	Amtran	Skyworth	Haier Smart Home
Sony	NEC	Founder	Apple	SmarDTV (Nagra)	Halliburton
Stellantis	Netgear	Fujitsu	Arcelik	Sony	Hitachi
Stellantis	Nokia Oyj	GigaByte	AU Optronics	Tatung	Honeywell
Tata Motors	OKI Electric	Google	BOE Technology	TCL Electronics	IGT
Tesla, Inc.		Great Wall	Robert Bosch	Technicolor	Illumina
Valeo SE		Hasee Computer		TomTom	Ingersoll Rand
Visteon Corp.		Hitachi Vantara		Tongfang	
Volkswagen AG		HP, Inc.			
Volvo					

# The Worldwide OEM Electronics Assembly Market - 2023 Edition

## List of Companies Analyzed

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

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**The Worldwide OEM Electronics Assembly Market - 2023 Edition (2022 database)**

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**TOTAL**

















