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# THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

***2019 Edition***

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

## Report Highlights

- **Worldwide Electronics Market Analysis, 2018–2023**
  - ◆ 52 Product Segments by Region and Supplier
  - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2018–2023**
  - ◆ OEM vs. Outsourced (EMS and ODM Subcontractors)
  - ◆ EMS, ODM, and OEM Production Market Share by Region, Market Segment, and Product (52 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)**

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# The Worldwide EMS Market - 2019 Edition

## Synopsis

The worldwide electronics manufacturing services (EMS) market is a determining force in production of electronics products and now accounts for 42 percent of all assembly. While the rate of growth for outsourcing experienced a burst in 2018, 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 18.1 percent in 2018 as a result of the growing of sales for communications infrastructure and internet storage.

**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 – 2019 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.

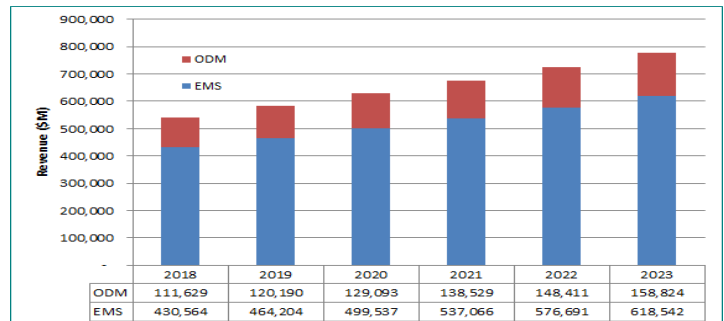
The report begins with an analysis of the worldwide electronics assembly market in terms of cost of goods sold, thus providing a baseline for the manufacturing value of electronics product assemblies. This forecast is checked against 52 individual product segments, including for the second time, The Internet of Things. The IoTs is looked at by industry segment (automotive, 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 \$1.3 trillion in 2018 and will grow to approximately \$1.5 trillion in 2023. Fueled by the demand for EMS services, the contract manufacturing industry will grow from \$542 billion in 2018 to \$777 billion in 2023 - 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 52 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, 2019 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.

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|                    |                    |                    |
|--------------------|--------------------|--------------------|
| 3CEMS              | HANZA Group        | Qisda              |
| Accton             | IEC Electronics    | Quanta Computer    |
| Alco Electronics   | IMI                | Sanmina            |
| ALL CIRCUITS       | Inventec           | Scanfil            |
| AmTRAN             | Jabil              | Season Group       |
| Asteelflash        | Kaga Electronics   | Selcom             |
| ATA IMS Berhad     | Katek              | SERCOMM            |
| Bitron Electronics | Katolec            | Shenzhen Kaifa     |
| Benchmark          | KeyTronicEMS       | Shenzhen Zowee     |
| BMK                | Kimball            | SigmaTron          |
| Celestica          | Kitron             | SIIX               |
| Cicor              | LACROIX            | SMT Technologies   |
| Compal Electronics | Leesys             | SMTC               |
| Computime          | Lite-On            | Sparton Technology |
| Connect            | Mack Technologies  | Sumitronics        |
| Creation           | Melecs             | Supermicro         |
| Delta Electronics  | Micro-Star         | Suzhou Etron       |
| Di-Nikko           | MITAC              | SVI                |
| Ducommun           | NEO Technology     | Topscom            |
| Elemaster          | New Kinpo Group    | TPV                |
| ECS                | Neways             | TQ-Systems         |
| Enics              | Nippon Mfg.        | TT Electronics     |
| eolane             | Norautron          | UMC                |
| ESCATEC            | Nortech Systems    | USI                |
| Fabrinet           | NOTE               | Valuetronics       |
| Fideltronik        | Orbit One          | Venture            |
| Firstronic         | OSE                | Vexos              |
| Flex               | Pan-International  | VIDEOTON           |
| Foxconn-Hon Hai    | PC Partner         | V.S. Industry      |
| Gemtek Technology  | PCI, Ltd.          | Vtech EMS          |
| Gigabyte           | Pegatron           | Wistron            |
| Global Brands Mfg. | Plexus             | WKK                |
| GPV Group          | Prettl Electronics | Wong's             |
| Hana Micro         | Providence         | Zollner            |

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