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# THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

***2020 Edition***

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

## Report Highlights

- **Worldwide Electronics Market Analysis, 2019–2024**
  - ◆ 46 Product Segments by Region and Supplier
  - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2019–2024**
  - ◆ 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): COVID-19 Impact
  - ◆ Regional Manufacturing Distribution by 51 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 103)**

**New Venture Research Corp.**

337 Clay St., Suite 101  
Nevada City, CA 95959  
Tel: (408) 244-1100

**A Technology Market Research Company**

kwilliams@newventureresearch.com  
www.newventureresearch.com  
Fax: (408) 904-5586

# The Worldwide EMS Market - 2020 Edition

## Synopsis

The worldwide electronics manufacturing services (EMS) market is a determining force in production of electronics products and now accounts for 43 percent of all assembly. While the rate of growth for outsourcing only grew incrementally in 2019 from the previous year, it clearly is the most desired manufacturing model for the assembly of advanced electronics products available to OEM companies. The EMS industry increased approximately 3.2 percent in 2019 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 – 2020 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.

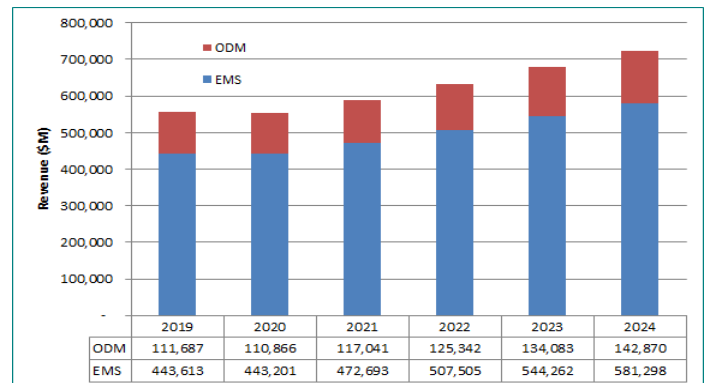
The report begins with an analysis of the worldwide electronics assembly market giving a baseline for the manufacturing value of electronics product assemblies. A forecast is checked against 46 individual product segments which make up the majority of electronics assembly (automotive, consumer, industrial, medical, aviation and aerospace and defense industries). Some segments such as transportation and retail will experience negative effects over the forecast period due to COVID-19. NVR estimates that total electronics assembly value (OEM+EMS+ODM) was \$1.3 trillion in 2019 and will grow to approximately \$1.4 trillion in 2024 at a CAGR of 1.9 percent, mostly fueled by the demand for EMS services. The contract manufacturing industry itself will grow from \$555 billion in 2019 to \$724 billion in 2024 - approximately at a 5.5 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 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 (103 companies—85 EMS and 18 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, 2020 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 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 an 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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Accton	HANZA Group	Qisda
Alco Electronics	IEC Electronics	Quanta Computer
ALL CIRCUITS	IMI	Sanmina
AmTRAN	Inventec	Scanfil
Asteelflash	Jabil	Season Group
ATA IMS Berhad	Kaga Electronics	Selcom
Benchmark	Katek	SERCOMM
BMK	Katolec	Shenzhen Kaifa
BYD Electronics	Keytronic	Shenzhen Zowee
Celestica	Kimball	SigmaTron
Cicor	Kitron	SIIX
Compal Electronics	LACROIX	SMT Technologies
Computime	Leesys	SMTC
Connect	Lite-On	Sparton Corp.
Creation	Mack Technologies	Sumitronics
DBG Holdings	Melecs	Suzhou Etron
Delta Electronics	Micro-Star	SVI
Di-Nikko	MITAC	Topscom
Ducommun	NEO Technology	TPV
Elemaster	New Kinpo Group	TQ-Systems
ECS	Neways	TT Electronics
Enics	Nippon Mfg.	UMC
eolane	Norautron	USI
ESCATEC	Nortech Systems	Valuetronics
Fabrinet	NOTE	Venture
Fideltronik	Orbit One	Vexos
Firstronic	OSE	VIDEOTON
Flex	Pan-International	VIRTEX
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
		Zollner

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### New Venture Research Corp.

337 Clay St., Suite 101

Nevada City, CA 95959

Tel: (408) 244-1100 Fax: (408) 904-5586

www.newventureresearch.com; kwilliams@newventureresearch.com

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