

***Now Available!***

---

# THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

***2022 Edition***

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

## Report Highlights

- **Worldwide Electronics Market Analysis, 2021–2026**
  - ◆ 46 Product Segments by Region and Supplier
  - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2021–2026**
  - ◆ 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 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 102)**

**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  
Fax: (530) 265-1998

# The Worldwide EMS Market - 2022 Edition

## Synopsis

The worldwide electronics manufacturing services (EMS) market is a determining force in production of electronics products and now accounts for 47 percent of all assembly. Outsourcing grew exceptionally in 2021 from the previous year, despite the COVID-19 crisis that disrupted the supply chain and labor force. The EMS industry increased approximately 14.8 percent in 2021 as a result of growing sales for notebooks, Internet and cloud servers, and smart phones.

**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 – 2022 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.

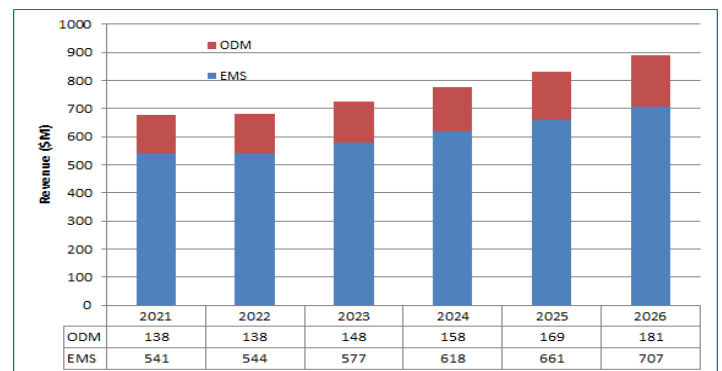
The report begins with an analysis of the worldwide electronics assembly market, giving a baseline for the manufacturing value of electronics product assemblies. A forecast is checked against 46 individual product segments which make up the majority of electronics assembly (automotive, consumer, industrial, 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 \$1.4 trillion in 2021 and will grow to approximately \$1.8 trillion in 2026 at a CAGR of 4.3 percent, mostly fueled by the demand for EMS services. The contract manufacturing industry by itself will grow from \$683 billion in 2021 to \$947 billion in 2026 at a 6.8 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 (102 companies—85 EMS and 15 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, 2022 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 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 his undergraduate degree in Astrophysics and holds an MSEE from the University of Colorado and an MBA from the Edinburgh School of Business.

# The Worldwide EMS Market - 2022 Edition

## Table of Contents

### Chapter 1: Introduction

- Objectives
- Organization
- Methodology

### Chapter 2: Executive Summary

- Worldwide Market Forecast
- Regional Market Share
- Application Market Share
- EMS Market Share
- EMS Performance

### Chapter 3: Worldwide Electronics Industry Forecast, 2021 - 2026

- Overview
- World Economic Outlook
- Summary Forecast
- Industry Forecasts
  - Communications (9 product segments)
  - Computers (10 product segments)
  - Consumer (9 product segments)
  - Industrial (4 product segments)
  - Medical (3 product segments)
  - Automotive (4 product segments)
  - Aviation, Defense, Other Transportation (7 product segments)

### Chapter 4: EMS Industry Structure, 2021

- The Worldwide OEM Market for Electronic Products
- Manufacturing Sources for Electronics Products
- OEM Market by Seven Market Segments
- EMS Market by Manufacturing Source (OEM, EMS)
- EMS Statistics by Company Size (large/med/small)
- Regional Production Market Share (57 Countries)
  - Americas (9 countries)
  - EMEA (33 countries)
  - APAC (15 countries)
- Industry Production by Market Share (46 products)
  - Communications (9 product segments)
  - Computer (10 product segments)
  - Consumer (9 product segments)
  - Industrial (4 product segments)
  - Medical (3 product segments)
  - Automotive (4 product segments)
  - Commercial Aviation (2 product segments)
  - Military/Defense, Other Transportation (5 product segments)
- Worldwide EMS Supplier Market Share

### Chapter 5: Industry Forecast, 2021-2026

- Worldwide OEM Market for all Electronic Products
- Manufacturing Source for Electronics Assembly
  - OEM Market by Product and Market Segment
  - EMS Market by Production Source (OEM, EMS)
  - Regional Production Share by Country/Segment
  - Product Application Forecast (EMS, ODM)
  - Total WW Available Market by Product/Country

### Chapter 6: Financial Benchmarks

- Financial Performance Benchmarks
  - 5-Year Sales Growth Rankings
  - Net Income Averages by Market Segment
  - Gross Margins by Market Segment
  - Return on Assets (Average plus Leaders)
  - Return on Equity (Averages plus Leaders)
  - Revenue per Employee (Average plus Leaders)
  - Revenue per Square Foot of Manufacturing Space
  - Other Performance Metrics - Earnings per Share
  - Growth (Average plus Leaders)
  - Average Base Wage Rate by 53 Countries
- Summary Performance Rankings by Leading Supplier

### Chapter 7: Mergers and Acquisitions

- Past Activity, 2016 - 2021 - Largest and Best Deals by Year
- Acquisition Classes and Valuations - Methods
- Best OEM Divestment Opportunities by Region
- M/A activity by OEM, EMS, ODM, OSAT and IDM

### Chapter 8: Company Profiles of Leading Suppliers

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

# The Worldwide EMS Market - 2022 Edition

## Table of Contents (continued)

### Partial List of Figures and Tables

Product Industry and Market Segments  
 Nominal GDP of Major Countries and Regions  
 Real GDP Growth Rates for Selected Countries  
 Electronics Assembly Market, 2021–2026  
 Computer Products, 2021–2026  
 Communications Products, 2021–2026  
 Consumer Products, 2021–2026  
 Industrial Products, 2021–2026  
 Medical Products, 2021–2026  
 Automotive Products, 2021–2026  
 Commercial Aviation, Defense, Other Transportation Products, 2021–2026  
 Worldwide EMS Market, 2021–2026  
 Worldwide OEM Market by Mfg. Source, 2021–2026  
 Worldwide OEM Market by Industry Segment, 2021–2026  
 Worldwide EMS Market by EMS Size, 2021–2026  
 Key EMS Statistics by Company Size, 2021  
 Worldwide EMS Market by Region, 2021  
 Large EMS Manufacturing Facilities by Country, 2021  
 Worldwide EMS Market by Country, 2021  
 — 57 Countries/Regions  
 Worldwide EMS Market by Industry Segment, 2021  
 — 7 Market Segments, 46 Products  
 — EMS and ODM Rankings  
 EMS Market Share, 2021  
 ODM Market Share, 2021  
 Top Ten CM Market Share, 2021  
 Worldwide OEM Market by Industry Segment, 2021–2026  
 Worldwide EMS Market by Company Size, 2021–2026  
 Worldwide EMS Market by Country and CAGR - 2021 and 2026  
 Worldwide Total Market by Country and CAGR - 2021 and 2026

Worldwide EMS Market by Region and Industry Segment, 2021–2026  
 Worldwide Total Market by Region and Industry Segment, 2021–2026  
 Worldwide EMS and Total Market by Product  
 — 46 Product Segments  
 — Forecasts from 2021 to 2026  
 Summary Financial Performance Metrics for Large Public EMS Companies, 2021  
 Key Financial Performance Metrics for Large Public EMS Companies, 2021  
 Worldwide EMS Margins by Industry Segment, 2021  
 EMS Companies by Revenue Growth Rate, 2021–2026  
 EMS Companies by Net Income, 2021  
 EMS Companies by Gross Margin, 2021  
 EMS Companies by Return on Assets, 2021  
 EMS Companies by Return on Equity, 2021  
 EMS Companies by Revenue per Employee, 2021  
 EMS Companies by Revenue per Square Foot, 2021  
 EMS Companies by Average Days Collection, 2021  
 EMS Companies by Inventory Turns, 2021  
 EMS Companies by Available Cash, 2021  
 EMS Companies by Debt to Equity, 2021  
 EMS Companies by 5-Year EPS Growth, 2021  
 Worldwide Performance Ranking for Leading EMS Companies, 2021  
 Worldwide EMS Wage Rates by Country, 2021  
 Merger and Acquisition Activity, 2021–2026  
 Leading Merger and Acquisition Activity by Company, 2021–2026  
 Average Merger and Acquisition Valuations by Company, 2021–2026

Publish Date July 2022 ~600 Pages

### Order Form

#### Payment Method

Check in the amount of \$ \_\_\_\_\_ is enclosed.

Invoice per P.O. # \_\_\_\_\_

Please charge: Visa MasterCard American Express

Card # \_\_\_\_\_ Exp. \_\_\_\_\_

Name On Card \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

**The Worldwide EMS Market, 2022 Edition (Single User License - PDF file shipped electronically)**

**\$3995**

**Add Extra Single User License (\$500 each) or Corporate License (\$1,500)**

**Returns:** No return privileges. **International Orders:** Must be prepaid, please contact us for payment arrangements.

#### New Venture Research Corp.

337 Clay St., Suite 101

Nevada City, CA 95959

Tel: (530) 265-2004 Fax: (530) 265-1998

www.newventureresearch.com; info@newventureresearch.com

Subtotal

Add Excel Spreadsheet of all tables (\$1000)

**TOTAL**