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THE WORLDWIDE ELECTRONICS MANUFACTURING SERVICES MARKET

2024 Edition

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

Report Highlights

- **Worldwide Electronics Market Analysis, 2023–2028**
 - ◆ 46 Product Segments by Region and Supplier
 - ◆ Total Assembly Value (OEM, EMS and ODM)
- **Worldwide EMS Market Analysis, 2023–2028**
 - ◆ 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 100)**

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The Worldwide EMS Market - 2024 Edition

Synopsis

The worldwide electronics manufacturing services (EMS) market is a determining force in production of electronics products and in 2023 accounted for 42 percent of all assembly completed. However, outsourcing grew negatively in 2023 from the previous year as a result of an economic downturn in the computer and communication industries. This resulted in an industry decline of approximately approximately 8.1 percent in 2023. Both EMS and ODMs suffered equally, particularly those serving the top tier.

New Venture Research (NVR) has followed this industry for 30 years and is pleased to offer its latest update on this continually expanding market. Our report, *The Worldwide Electronics Manufacturing Services Market – 2024 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 industrial are strong sources for outsourcing demand. NVR estimates that total electronics assembly value (OEM+EMS+ODM) was \$1.3 trillion in 2023 and will grow to approximately \$1.5 trillion in 2028 at a CAGR of 4.6 percent, mostly fueled by the demand for EMS services.

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 46 individual products. 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 the 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 (100 companies—82 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, 2024 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 30 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.

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