

# **The European Electronic Manufacturing Services Industry 2008-2013**

A Strategic Study of the European EMS Industry

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## The Complete Guide to the European Electronic Manufacturing Services Industry

With revenues forecast to decline by over 13% in 2009 the European EMS industry is facing a period of uncertainty and rapid change. In Western Europe the leading Tier 1 EMS providers have already relocated volume manufacturing to lower cost locations. They have however retained a manufacturing presence and are looking to compete in the growth markets of aerospace & defence, medical, control & instrumentation, automotive and industrial as they recover in the 2010/2011 timeframe. It is here that the real battle for the vast majority of the around 700 EMS companies in Europe will take place. Competition is expected to intensify with the emergence of regional players with multiple locations and strong focus on the growth markets. It is also the market being served by the large number, over 600, of national EMS providers with a single manufacturing facility and small but long established customer base.

Increased competition will lead to consolidation as companies are acquired or close due to ever increasing financial pressures, although it is not expected that there will be a mass exodus of companies in the period to 2013. There is a more than distinct possibility that one or possibly two of the major Tier 1 EMS companies will merge. Mergers between the major European EMS providers, is also a possibility although this is expected to be either on a national or sub-regional basis rather than pan-European.

A key trend in recent years has been the migration in EMS production from Western Europe to Central and Eastern Europe (CEE) resulting in the CEE accounting for just under 55% of European EMS revenues in 2008. This is expected to fall slightly in 2009 as the major Tier 1 EMS providers cut back production to meet lower demand, EMS revenues in the CEE forecast to decline by 17% during the year. As end demand recovers so will the share the CEE accounts of the EMS market although the previous double-digit annual growth will reduce to a more pedestrian pace of 5-6% from 2010 to 2013. The transfer of production from Western Europe will continue to be an important factor in the region's growth in particular in lower volume high mix products.

The ninth edition of **The European EMS Industry report 2008-2013** highlights the issues impacting the European EMS industry. This comprehensive report provides:

- An analysis and revenue forecasts for both West and East and Central Europe in a single report.
- The key trends impacting the major EMS companies by market group.
- Detailed profiles of the Top 20 European EMS companies, including a ranking for 2008.
- A ranking of the Top 50 EMS providers in Europe.
- Country and regional profiles including key trends, the role of the Global "Tier 1" companies and profiles of the major EMS companies.
- A directory of over 1,000 manufacturing locations.

### Who will benefit

The Electronics Manufacturing Services (EMS) industry report is essential research for all areas of the electronics industry including:

**Distributors and manufacturers of electronic components and materials** - the profiles and directory provide a detailed analysis of potential customers, highlights growth markets by country/region. Understanding and interpreting the market trends will also be important as this market further develops

**Production equipment suppliers** – the profiles and directory provide a detailed analysis of potential customers, track key EMS trends.

**OEMs** – A comprehensive guide to the major EMS companies in Europe. Analyze the structure of the industry and the emergence of four distinct groups of EMS company.

**EMS** – The report provides a complete overview of the European EMS industry, including revenue forecasts by country, competitor information and the trends which will have an impact on business in the period to 2011.

Other organizations which will benefit from the report include:

- Government, including investment organizations.
- Financial and industry analysts.
- Academic institutes & universities tracking developments in the electronics industry.

Europe will continue to provide significant opportunities for companies already involved in the European EMS industry. It will also offer opportunities for companies in Asia and the Americas who are looking to expand geographically into new markets.

The European EMS Industry report allows you to track these developments in a single cost-effective study providing both detailed market and company analysis.

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## 1 Introduction

### 1.1 Scope & Methodology

This is the ninth edition of the European Electronic Manufacturing Services Industry report (previously titled the European Contract Electronic Assembly Industry) and updates the eighth edition, which was published in August 2007. Although building on the database of information which has been gathered since the publication of the first edition in 1993 the new report has been fully revised with greater emphasis being placed on analyzing the EMS providers and the key trends which will impact the industry in the period to 2013.

As in the previous reports, EMS is defined as electronic manufacturing offered as a service to other companies. It does not include the in-house activities of companies, which also provide an EMS service. The production of the printed circuit board is to some extent included, since some EMS companies have acquired PCB production capabilities and all are often involved in the design aspects of the PCB layout when offering design services as part of the EMS activity.

The generation of the market numbers has been completed using both a 'bottom up' approach where details of EMS companies have been accumulated from all sizes of companies, and a 'top down' view of published data from a variety of sources. Statistical information which was obtained from government departments, trade associations, company annual reports and various other publications, and in particular the *Yearbook of World Electronics Data*, was combined with data obtained from individual companies, to evaluate the state of the market and future developments. The previous report along with data from RER's database were used as a base point in evaluating market developments during interviews with key personnel of a cross-section of EMS companies. Further information was obtained by Questionnaires in personal and telephone interviews.

Forward looking forecasts are constructed from the last full reported year (2008) and include known information to date on EMS company activities such as collaborations, mergers, acquisitions and closures. These forecasts also include information from EMS and other companies on their expectations for growth in the coming years.

For sales to individual sectors such as computer, communications, mobile etc, we have used information from the companies themselves either in the main from published accounts or from known information about plant specialization, number of employees etc.

Annual reports, company brochures and corporate literature were collected from over 200+ EMS companies. Where information of a confidential nature was obtained, this was used solely to evaluate market trends in product and end-user sectors. In addition a further 500 companies, primarily the smaller national EMS providers, were checked for the directory.

The consultants also visited relevant trade shows including Productronica 2007 and Electronica 2008 in Munich; the UK-based NEW Electronics exhibition in 2006 and 2009; SMT & Hybrid 2009 in Nürnberg, Germany, Forum, France and Electronics Automation 2007 in Utrecht, the Netherlands.

Where applicable local currencies have been converted to Euro values. The forecasts assume constant Euro values. The Euro values used in the report are given in the Appendix.

#### **Original Design Manufacturers (ODM) and Electronic Manufacturing Services (EMS)**

The key differentiator between the two types of organisations is that ODM's own intellectual property as well as providing electronic manufacturing services. The EMS is considered to only provide the manufacturing services. In Asia, there are large manufacturing services who also own intellectual property in the products that are sold as branded products by the OEM. Whilst there are companies in Europe that do offer the ODM service and state that ODM sales have been made, it is frequently not separated from the overall sales in Europe in its published form.

Given the difficulty in separating out specific ODM sales data, we have incorporated this within the total EMS sales. From the research we would estimate that the total ODM element is approximately 5-10% of the total EMS values and mainly within the top 20 companies.

## 1.2 Report Structure

Following the Executive Summary, Section 3 provides a detailed analysis of the trends impacting the European EMS industry in the period to 2013. EMS revenues are provided for individual countries and split by region. A figure for the European EMS market by segment is also provided. Again for this edition, the report has also analyzed the trends impacting the four principal groups of EMS company:

- Top 7 global and European.
- Regional players.
- Sub-regional players.
- National players.

Section 4 provides profiles of the top twenty EMS providers in Europe with an estimate of their sales for 2008. The structure of the industry and a summary of the latest industry developments are also provided.

Section 5 provides a breakdown by country and region. For each section an overview of the electronics industry is provided along with a summary of the key factors impacting the EMS industry. For each country or region we have outlined the role the global "Tier 1" companies are playing along with profiles of the leading EMS companies. Over 100 EMS providers are profiled within the section.

Section 6 is a directory of around 1000 manufacturing locations from approximately 700 separate companies. The directory is split by country. Companies who are focused solely on cable and wire harnesses are not covered within the directory.

For the this edition of the report we have also provided a ranking of the Top 50 European EMS providers for 2008, the table in Section 7 of the report.

## Sample Pages

### 3.2 The Market for EMS in Europe

#### 3.2.1 Why Outsource?

There are a number of reasons for an OEM to outsource the manufacture of their products, and perhaps additional services or functions to an Electronic Manufacturing Service provider, and whilst many will be directly related to a reduction in cost, there are usually a more complex mix of reasons.

EMS companies can provide:-

- A further manufacturing resource to that of the OEM which can absorb some or all of the fluctuations in the demand cycle.
- May provide all of the manufacturing resource for an OEM.
- A resource of up-to-the-minute manufacturing expertise.
- Reduction in working capital for the OEM.
- Immediate availability of trained and experienced staff.
- Shortened time for availability or the acquiring of new technologies.
- Optimisation of yield and rework costs.
- Ability to offer after sales and 'product after-care' services.
- Ability to work with design, pre-production, NPI and other services at the EMS which may be in short supply in-house.
- An experienced supply chain management.
- The reduction in business risk with capital 'tied up' in major equipment.

All these services can result in an OEM being able to accelerate its 'time to market' for a particular product, at a reasonable cost, and leaves the OEM to concentrate on areas of higher value such as 'Design' and 'Research & Development' and maximising 'Brand' value.

EMS companies are now looking to provide more integrated services with many offering real vertical integration of manufacturing or by use of partners or preferred suppliers, a virtual integration. Using an increasing level of expertise of design for manufacture, some EMS are providing ODM services for a limited range of components which allow large and small OEM's to customize their equipment whilst providing the end-customer with more relevant features.

#### 3.3.3.2 Flexibility in Manufacture, Supply and Service

This goes to the heart of the EMS service and the ability of the EMS to respond to changes in expected demand is crucial to maximise the profitability for the OEM either in increasing production to take advantage of a better product performance in the market, or to reduce production to accommodate lower sales or adjustments to the supply chain pipeline. There are other changes to which responses must be made and this may concern the mix or variations of a product, for example different models or variations such as colour, functionality within a product series. There may also be more substantial changes to a product design or assembly which may themselves have 'knock-on' effects to the manufacturing or testing process.

OEM's need fast and effective management to these product changes or to new demands in the supply chain. The success of an end product in an individual market may bring as many problems as falling sales. New geographical markets may in themselves bring different legislative requirements in packaging or individual components which need to be checked, sourced and brought to the manufacturing centre. These changes may also apply to all aspects of the EMS offering from redesign of the product to aftermarket services and the juggling of capacity and resources within the EMS, and from customer to customer is not easy to manage.

#### 4.3.13 Kitron

#### 4.3.13 Kitron

Kitron is the leading Norwegian company in the development and manufacturing of electronics for medical, defence/marine, data/telecom and industrial applications. The company has manufacturing locations in Norway, Sweden and Lithuania. At the end of 2008, Kitron employed 1,470 people (Norway 748, Sweden 255, Lithuania 464 and China 5) and reported sales of NOK 2,269.5 million. Kitron is a medium-sized high mix-low volume company offering a full range of manufacturing services including development and design through industrialisation, sourcing and logistics to manufacture, redesign and upgrading of products to extend their life.

In June 2009 Kitron ASA signed an agreement to sell its Microelectronics business at Røros to some of the local employees and Norbit AS. Kitron Microelectronics AS, which is not seen as a core business, has about 50 employees and had an annual turnover of NOK 128 million in 2008. The transaction is expected to be closed at the end of June 2009, subject to finalising the financing arrangements.

Kitron's activities are split into three companies Kitron AB in Norway, Kitron AS in Sweden and UAB Kitron in Lithuania. In Norway, Kitron AS has manufacturing facilities in Arendal and a development operation in Oslo. The manufacturing facility in Oslo was closed in 2006 and the plant in Horten in March 2009. In Sweden, Kitron AB has facilities in Karlskoga and Jönköping. The manufacturing activity in Flen was discontinued in the second half of 2007. In the final quarter of 2008 Kitron made the decision to transfer production of one of the main products at its plant in Karlskoga to Lithuania and scale back capacity at the site accordingly.

Completed in 2002, Kitron set up a low-cost facility in the university town of Kaunas, Lithuania. Labour intensive manufacture has been transferred to this plant, which has been built to Scandinavian standards.

In June 2007, Kitron and EDC i Munkfors AB, headquartered in Sweden, entered into an agreement whereby Kitron would acquire certain assets from EDC, among these EDC's subsidiary EDC Elsis UAB in Kaunas, Lithuania. The investment amounted to approximately SEK14 million.

During 2008 Kitron restructured its operations in Lithuania with production being consolidated at one site. The company also purchased the leased facility it operated in the country for Euro 3.4 million and plans to expand the site over the next few years as part of the company's overall strategy to increase manufacturing capacity. The current plans envisage increasing the site by 4,000 sq m. As part of the development of its operations in Lithuania the company has also increased productivity and streamlined manufacturing in order to add capacity.

In November 2007, Kitron AS and Saab Avitronics announced they had extended their strategic cooperation which was originally signed in 1989. The two companies have entered into two new agreements in connection with Saab Avitronics' business in the market of civil and military electronic aviation systems. The contracts have a value of approximately NOK 10 million in the period 2008-2010. The agreements include possibilities for extended volumes in the period up to 2021.

In October 2008 Kitron ASA's subsidiary UAB Kitron in Kaunas, Lithuania, announced it had received new orders within the marine segment of NOK 90 million for first half 2009. The company has also announced that it has received a new order from Kongsberg Defence & Aerospace (KDA) amounting to NOK 40 million. The products will be delivered in the first and second quarter 2009 and are part of KDA's weapon control system PROTECTOR. Kitron will deliver products for this system to a total value of about NOK 113 million in 2008 and expect continued growth in 2009.

In the first half of 2009 Kitron has announced a series of new orders across its business. In February 2009 Kitron received new orders related to military communication equipment of NOK 16 million. The new orders are part of an international product- and development project with a time schedule up to 2011, and with an expected revenue for Kitron of about NOK 120 million. In 2009 Kitron will deliver development, training and project management services of NOK 13 million as well as manufactured products of NOK 16 million.

In May 2009 received an order amounting to NOK 19 million for other military related equipment. This additional order will be delivered in 2009.

Kitron AS has also strengthened its position within the Data/Telecom segment and has so far secured incremental orders at an annual value of NOK 100 million in 2009. The manufacturing of the incremental volume will start in Q3 2009 with a revenue value of NOK 50 million in 2009 and NOK 100 million in 2010.

According to the company the Data/Telecom segment is offering interesting opportunities within new development. Kitron is currently developing several Product Platforms in collaboration with existing customers. An example of such is a DVR (Digital Video Recorder) Platform, which has been developed by Kitron and is currently being offered to several customers within different sectors. On this platform alone Kitron sees an annual business potential of NOK 20-40 million.

In the medical sector Kitron has entered into a cooperation agreement with NorDiag regarding preparation of NorDiag's "Arrow" instrument for batch production. It is the parties' intention to firm up and sign an agreement by August 2009.

In June 2009 Kitron entered into a long term Cooperation Agreement with Aidon Ltd, while at the same time Kitron's subsidiary UAB Kitron in Lithuania entered into an Electronic Manufacturing Services Agreement with the same company. Both agreements are related to industrialisation and manufacturing of Aidon's AMR (Automatic Meter Reading) products. Kitron's services can also be extended into product development-, engineering-, sourcing- and logistic services, based on Aidon's needs. In 2009 Kitron expects operating revenues of NOK 25 million, increasing to approximately NOK 120 million in 2010 from these agreements. Industrialisation and manufacturing of Aidon's products are supplied from UAB Kitron in Lithuania but additional services can also be offered from other Kitron operations in Sweden, Norway or China based on competencies required.

In May 2009 IAR Systems signed an agreement with Kitron under which Kitron will become an IAR Systems distributor for Norway. With an experienced team of development engineers, Kitron can undertake assignments ranging from simple development work to complete product packages. Kitron supports its customers from concept to volume production in one of its manufacturing plants. IAR Systems is the world's leading supplier of software tools for embedded systems.

Following the release of its 2009 first quarter result Kitron revised down its outlook for 2009 with sales forecast to decline by 15%. As a result the company plans to reduce the number of full time employees by 370 as opposed to the earlier estimate of 250 announced in February 2009. The capacity adjustments and other initiatives to reduce costs will result in a NOK 60 million reduction in the company's cost base in 2009. The annualized cost reduction is now set at around NOK 135 million.

#### Financial Highlights of Kitron Group – Year end December

Sales in 2008 rose by 17% to NOK 2,269.5 million, the increase mainly related to current customers although new business was generated during the year. The order intake in 2008 amounted to NOK 2,327.4 million and compared to NOK 1,893 million in 2007, while the back log at the end of the year was NOK 971 million (2007: NOK 914 million). Sales increased across all markets with Data/Telecom up 15.4%, Defence/Marine 30.5%, Medical 7.8% and industrial 11.5%.

#### Sales by Market

NOK millions	2008	2007	2006	2005	2004
Marine/Defence	709.2	543.6	420.8	422.4	489.4
Data/Telecom	615.3	533.1	431.3	450.3	524.1
Medical	439.5	407.6	413.3	344.4	364.2
Industrial	505.5	453.5	428.2	359.2	370.3
Total	2269.5	1937.8	1693.6	1576.3	1748.0

**Sales by Geographical Area**

<b>NOK millions</b>	<b>2008</b>	<b>2007</b>	<b>2006</b>	<b>2005</b>	<b>2004</b>
Norway	1138.0	944.7	760.3	819.0	1043.2
Sweden	963.0	824.3	777.0	624.2	553.4
Rest of Europe	76.7	89.4	59.9	56.7	55.5
USA	60.6	20.6	35.1	14.5	10.0
Other	31.2	58.8	61.3	61.9	85.9
<b>Total</b>	<b>2269.5</b>	<b>1937.8</b>	<b>1693.6</b>	<b>1576.3</b>	<b>1748.0</b>

**Sales by Business Area**

<b>NOK Million</b>	<b>2008</b>	<b>2007</b>
Kitron AS	1486.9	1326.4
Kitron AB	498.8	433.7
UAB Kitron	421.7	319.3
Other & Eliminations	(137.9)	(141.6)
<b>Total EMS</b>	<b>2269.5</b>	<b>1937.8</b>

**Operating Profit by Business Area**

<b>NOK Million</b>	<b>2008</b>	<b>2007</b>
Kitron AS	108.5	66.6
Kitron AB	27.5	0.6
UAB Kitron	33.6	21.3
Other & Eliminations	(11.1)	(4.1)
<b>Total EMS</b>	<b>158.5</b>	<b>84.4</b>

**Leading Financial Indicators**

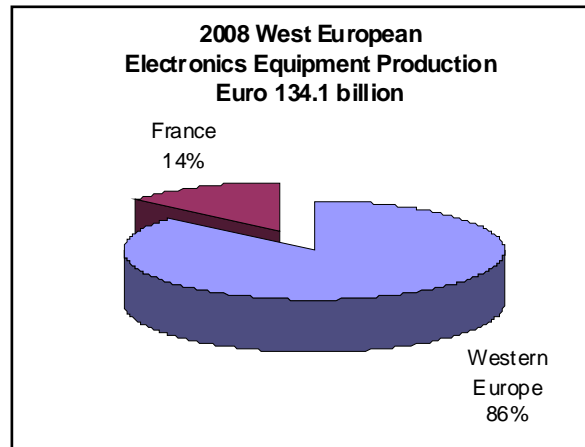
<b>NOK millions</b>	<b>2008</b>	<b>2007</b>	<b>2006</b>	<b>2005</b>	<b>2004</b>
Net Sales	2269.5	1937.8	1693.6	1576.3	1748.0
Operating Profit/(Loss)	158.5	84.4	64.4	(34.4)	(53.3)
Net Profit/(loss)	214.3	64.4	41.7	(58.8)	(75.2)
Capital Expenditure	70.4	49.1	40.5	28.5	21.3
Total assets	1250.2	1001.1	957.5	652.5	610.8

## 5.1 France

### 5.1.1 Electronics Industry Overview

Output for the French electronics industry fell by a further 1.8% in 2007, and followed declines of 4.8%, 2.4% and 5.6% in 2006, 2005, and 2004, respectively. The sharp decline in the global economy resulted in electronics equipment production falling by an estimated 4.9% in 2008 with output forecast to fall by a further 13.2% in 2009 and by a more modest 3.9% in 2010. A modest recovery is expected in 2011 and 2012 but overall output will remain significantly below 2008's level at the end of the forecast period.

The French electronics industry continues to be dominated by the production of fixed and wireless communications, the two product groups accounting for 30.6% of total output in 2007, down from around 37% at the height of the boom in 2000. The country is also a leading producer of radar, navigation and defence electronics output accounting for 19.3% of the total in 2007.



**Table 5.1 Summary of French Electronics Equipment Production**

Euro Millions	2006	2007	2008	2009	2010	2011	2012
Computing	2984	2440	2014	1573	1439	1361	1318
Industrial	3855	4099	4222	4080	4167	4301	4485
Communications	12237	12234	11646	9899	9404	9443	9522
Consumer	903	720	659	548	469	407	349
TOTAL	19979	19493	18541	16100	15479	15512	15674

Notes: Computing includes office equipment; Industrial combines control and instrumentation and medical and industrial; and communications combines fixed and wireless communications (inc defence). Due to computer rounding the summary figures above may differ slightly from the figures presented in the main tables.

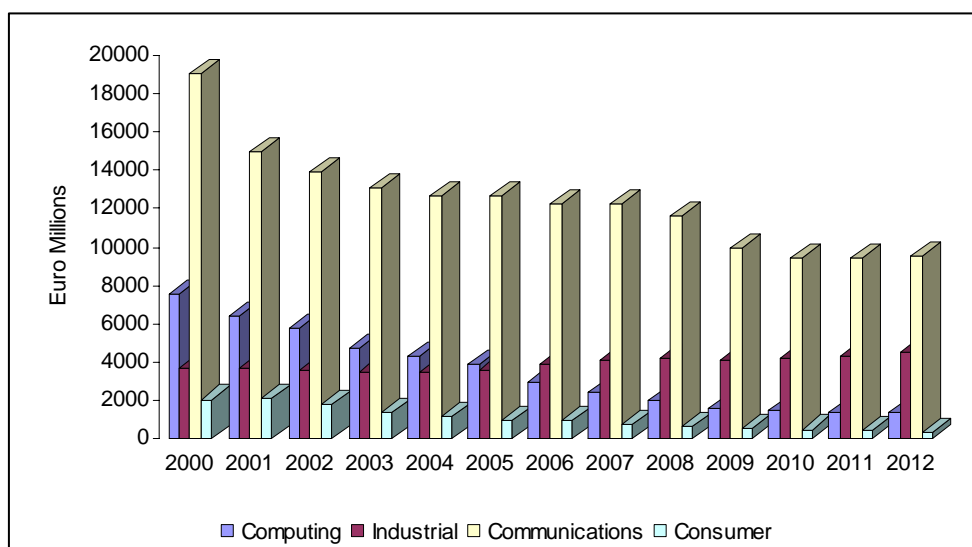


Figure 5.1 French Electronics Output by Major Product Group 2000-2012

#### **5.2.4.15 Rob Electronic**

The Rob Group comprises five companies and had group revenues of Euro 49.5 million in 2008 and employes approximately 240 people and provides electronics development, electronics manufacturing and cables and connection systems. The holding company, which accounted for 9% of revenues in 2006, is located in Nuelingen and had four operating companies.

Rob-Electronic GmbH is the largest member of the Rob Group accounting for 64% of sales in 2008. Located in Nuelingen, the company provides production and assembly and testing of electronic assemblies, end-devices and systems. Between 2002 and 2004 the site, along with the Group headquarters was expanded by 5,000 sq m.

Rob SA was established in Bioggio, Switzerland in 1999 and provides production and assembly and testing of electronic assemblies, end-devices and systems. The company accounted for 22% of Group sales in 2008. The company completed a 3,000 sq m expansion in December 2007.

Rob-Engineering is located in Nuelingen and provides hardware and software design, development and sales and marketing. The company accounted for 2% of Group revenues in 2008.

Rob-Connect, which is also located in Nuelingen provides pre-made cables and the design and development, production and testing of connectors and connection systems. The company accounted for 3% of Group sales in 2008.

In January 2007, the Rob Group established a Romanian subsidiary Rob-Systems SRL in Hemmannstadt, Romania and announced in the following month that it had acquired a 15,000 sq m site for the construction of a new plant. Ground breaking on the 1,000 sq m plant took place in August 2008 with the aim to complete construction in 2009.

The company uses full automatic SMT assembly lines using various assembly machines such as Siemens Siplace HS50 and F5, Mydata MY15 and MY12. The company uses both reflow convection soldering as well as vapour phase soldering. Conventional assembly uses semi-automatic Laser-Lite assembly benches. The company has the SMT capacity to produce 500 million assemblies per annum and 50 million through hole assemblies.

The company is certified to ISO 9001 and has approval to EN 46002 (medical technology).

Building and security accounted for 25% of Group sales in 2008, medical technology 25%, automotive electronics 19%, measurement technology 11%, automation engineering 7%, telecommunications 6%, domestic appliances 4% and other 3%.

#### **5.2.4.16 RSG-Elotech**

RSG-Elotech was established in 1993 and is located in Bad Lobenstein, Thuringia and provides electronic manufacturing services for both the German and European market. In 2008 the company reported revenues of Euro 54.5 million, down from Euro 56 million a year earlier, and employed 302 people. Automotive accounted for 57.2% of sales in 2008, industrial 29.8% and customer services 13%. Since March 2004, the company has been certified to ISO TS 16949.

Services offered by the company include PCB design, purchasing, automatic assembly of SMT and through-hole components, manual assembly and test. The company has seven SMT lines (Universal, Philips, Mydata), one axial automatic insertion machine (Universal) and one radial automatic insertion machine (Universal).

## 6 DIRECTORY

### 6.1 Austria

Company: **AB Mikroelektronik GmbH**

Address: J.-Brandstätter Straße 2, 5020 Salzburg, Austria

Tel: +43 662 44991-0

Fax: +43 662 4204 89-10

Contact: Erwin Reisser

Website: [www.ab-mikro.at](http://www.ab-mikro.at)

Parent Company: TT electronics, UK

Note: The company is focused on hybrid technology and mechatronics

Company: **Becom Electronics GmbH**

Address: Technikerstr. 1, 7442 Lockenhaus, Austria

Tel: +43 2616 2930

Fax: +43 2616 2930 112

CEO: Johan Bock

Business Segment Manager EMS: Frank Klein

Sales & Marketing Manager: Manfred Hofer

Sales: Euro 41 million (2007/2008)

Employees: 340 (2007/2008)

Website: [www.becom.at](http://www.becom.at)

Parent Company: Bewag

Company: **CMS Electronics GmbH**

Address: Ebentaler Str. 140, 9020 Klagenfurt, Austria

Tel: +43 463 3834 0

Fax: +43 463 3834 417

Marketing & Sales: Harald Schiemann

Production Manager: Hans Zöhrer

Sales: Euro 30.1 million (2008)

Website: [www.cms-electronics.at](http://www.cms-electronics.at)

Company: **Flextronics International**

Address: Friesacherstr 3, 9330 Althofen, Austria

Tel: +43 4262 2644 1100

Fax: +43 4262 2645

General Manager: Eric Dörflinger

Website: [www.flextronics.com](http://www.flextronics.com)

Parent Company: Flextronics

Note: Part of Flextronics Special Business Solutions

Company: **Flextronics International (European Headquarters)**

Address: World Trade Centre, 2nd Floor, 1300 Vienna, Austria

Tel: +43 1 602 4100

Fax: +43 1 602 4100 1750

Sales Manager: Helmut Pliessnig

Website: [www.flextronics.com](http://www.flextronics.com)

Company: **Weedon Electronics Ltd**

Address: Unit 66, Wilbury Way, Hitchin, Herts SG4 0TP, England

Tel: +44 1462 427700

Website: [www.weedonelectronics.com](http://www.weedonelectronics.com)

Company: **Wilson Process Systems**

Address: Waterworks Road, Hastings, East Sussex TN34 1RT, England

Tel: +44 1424 722222

Fax: +44 1424 720730

Managing Directors: Tim and Nick Wilson

Plant Area: 2,800 sq m

Sales: £9 million (2008)

Employees: 120

Website: [www.wps.co.uk](http://www.wps.co.uk)

Company: **Xitek Ltd**

Address: Unit B2, Haysfield Business Centre, Spring Lane North, Malvern, Worcs WR14 1GF, England

Tel: +44 1684 899125

Fax: +44 1684 899178

Marketing Manager: Andrew Perkins

Website: [www.xitek.co.uk](http://www.xitek.co.uk)

Company: **Zeal Electronics Ltd**

Address: Vanguard Trading Estate, Storforth Lane, Hasland, Chesterfield, Derbyshire S40 2TZ, England

Tel: +44 1246 209009

Managing Director: Anthony Hagin

Plant Area: 7,200 sq ft

Website: [www.zeal-electronics.com](http://www.zeal-electronics.com)

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