

## The European EMS Industry – A Strategic Analysis of the Top 50 European EMS Providers

The German Zollner Group remained the leading European-owned EMS provider based on global revenues with estimated EMS revenues of Euro 1,375 million in 2019. Following the completion of Asteelflash's acquisition by the Chinese company Universal Scientific Industrial, the Hungarian EMS provider VIDEOTON was second, followed by Enics, Scanfil and Neways. The Top 5 all reported revenues over Euro 500 million in 2019 while the companies ranked between 6th and 12th all achieved revenues over Euro 300 million.

### The Top 25 European-Owned EMS Providers in 2019

GPV following the acquisition of the Swiss company CCS Holdings in 2019 is ranked 6th with three French companies - éolane, LACROIX Electronics and ALL Circuits, the German company KATEK and Norway's Kitron all in the top 10.

The completion by KATEK of the acquisition of fellow German EMS Leesys in January 2021 will result in a group with revenues of around Euro 500 million, and the second largest EMS in Germany,

Kitron, duotec, Elemaster, TT Electronics, HANZA, Scanfil and Inission have all completed targeted acquisitions in 2018-2020 and it is expected that further acquisitions will take place over the next 2/3 years as companies look to strengthen their operations in both Europe and globally.

Although we are seeing the emergence of a number of larger European companies the major global players continue to dominate the European EMS industry. In 2019, the Top 3 – Foxconn, Flex and Jabil – accounted for 39% of EMS revenues generated in the region. In addition, the North American companies - Sanmina, Celestica, Kimball Electronics and Plexus - as well as the Philippines headquartered Integrated Micro-Electronics are all ranked in the Top 25 European EMS providers and will provide significant competition for the larger pan-European groups.

The Eleventh Edition of **The European EMS Industry - A Strategic Analysis of the Top 50 EMS Providers** provides a detailed overview of the key companies impacting the European EMS industry. This comprehensive report provides:-

- A ranking of the Top 50 European EMS providers in 2019.
- A ranking of the Top 50 European-owned EMS providers in 2019 based on global revenues.
- Detailed profiles of the Top 50 European EMS providers, the leading EMS companies in Israel and the Top 10 non-European including an outline of their operations and latest company developments.
- A summary of key European EMS acquisitions and strategic alliances for 2011-2020.
- An overview of the European EMS market for 2019-2024.

Rank	Company	Country
1	Zollner	Germany
2	VIDEOTON	Hungary
3	Enics	Switzerland
4	Scanfil	Finland
5	Neways	Netherlands
6	GPV	Denmark
7	éolane	France
8	Kitron	Norway
9	KATEK	Germany
10	LACROIX Electronics	France
11	ALL Circuits	France
12	Fideltronik	Poland
13	Melecs	Austria
14	BMK Group	Germany
15	TT Electronics	UK
16	Elemaster	Italy
17	TQ-Group	Germany
18	HANZA	Sweden
19	duotec Group	Germany
20	Cicor	Switzerland
21	NOTE	Sweden
22	Variosystems	Switzerland
23	Connect Group	Belgium
24	Bitron Electronics	Italy
25	Elrad	Slovenia

*Note: Includes acquisitions announced in 2019/2020*

#### 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.

**Production equipment suppliers** – the profiles and directory provide a detailed analysis of potential customers ,

**OEMs** – A comprehensive guide to the major EMS companies in Europe in detail. Allows the user to quickly identify the key players by location, size and core capabilities.

**EMS** – provides detailed competitor analysis on the key 60 European EMS providers

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.

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### 2 Rankings

### 3 Profiles of the Leading European EMS Providers

ALL Circuits  
Axiom Manufacturing  
BB Electronics  
Becom  
Bitron Electronics  
BMK Group  
Cicor  
cms electronics  
Connect Group  
Deltac Automotive  
duotec Group (TURCK duotec)  
Electronica Cerla  
Elemaster  
Elrad  
Enics  
éolane  
Fideltronik  
GPV  
Groupe Cofidur  
HANZA  
Ikor  
Incap  
Inission  
KATEK  
Kitron  
LACROIX Electronics  
Matra Electronique  
Melecs  
MW.FEP  
Neways  
Noratron  
NOTE  
Orbit One  
Pantel-Elektronik  
Prettl Electronics  
RAFI  
Scanfil  
Selcom Group  
Selha  
Semecs  
Sero  
Sony  
Tectron  
Tonfunk  
TQ-Group  
Tronico ALCEN  
TT Electronics  
Variosystems  
VIDEOTON  
Zollner

Non-European companies profiled include: Israeli-based EMS companies include:

Asteelflash (USI)	AL Technologies
Benchmark Electronics	Nistec
Celestica	PCB Technologies
Flex	RH Technologies
Foxconn	USR Electronic Systems
Integrated Micro-Electronics	
Jabil	
Kimball Electronics	
Plexus	
Sanmina	

### 4 Directory of Manufacturing Facilities

No of Pages: 172

## Related Reports

### The European EMS Industry - A Strategic Market Analysis of the European Electronic Manufacturing Services Industry 2019-2024

The Eighteenth edition of **The European EMS Industry - A Strategic Market Analysis of the European Electronic Manufacturing Services Industry 2019-2024** highlights the issues impacting the European EMS industry and provides an update to RER's regular bi-annual report on the industry which was first published in 1993.

This comprehensive report provides:-

- Detailed market analysis to 2024 for Western Europe, CEE and North Africa/Israel in a single report
- Breakdown of the West European and CEE market by major sector.
- Detailed analysis and comment on the key market trends impacting the European EMS Industry.
- Ranking and detailed profile of the Top 25 EMS providers in Europe
- An overview of the EMS industry by major country or region, including highlighting the major players including a ranking of the Top 15 in 2019.
- A directory by country of around 1,675 EMS manufacturing locations, contact numbers, websites etc.
- A ranking of the top 50 EMS in Europe in 2019 by turnover plus a ranking of the Top 50 European EMS companies based on global revenues.

*For further information please contact [andrew.fletcher@rer.co.uk](mailto:andrew.fletcher@rer.co.uk) or telephone +44 1235 227310*

### Consultancy

In addition to our published reports RER can provide bespoke consultancy on the European EMS industry to meet your specific research requirements.

We can also support internal strategy meetings with tailored reports on the EMS or the broader electronics industry.

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## European Electronic Markets Forecast - tracking the latest developments in the European electronics industry ...

Although Europe has lost share of global electronics output the region still accounts for around 13% of total production and a major position for lower volume higher complex products in markets such as automotive, aerospace, defence, medical, industrial, IoT and high-end communications. In addition, Central and Eastern Europe provides low-cost volume manufacturing and increasingly is now adding manufacturing capacity for more complex products as European and global companies look to take advantage of lower cost production within close proximity to the West European market.

To take advantage of the opportunities within the European electronics industry needs regular monitoring of the latest developments. *European Electronic Markets Forecast (EEMF)* is a monthly report designed to allow you to track with minimum time and cost, the key issues and opportunities impacting the European and global electronics industry.

EEMF utilizes approaching 40 years of industry and market research experience to provide you not only reliable but objective analysis. Each month EEMF provides

- The latest company developments and market analysis.
- Original research articles providing in-depth overviews across key growth sectors of the European electronics and related industries.
- The latest industry indicators.

### Adding value to stand alone research

Since its launch in 1996 EEMF has supported RER's research activities by providing regular analysis of the latest market and company developments.

In the context of the EMS industry EEMF tracks over 100 plus EMS companies to provide the latest company developments. In addition, analysis is provided on the key sectors driving growth in Europe including automotive, aerospace & defence, medical, industrial and IoT.

### Delivery/Pricing

Delivered via email EEMF is priced at £450 (£360 introductory price) for an annual subscription. A multi-user licence is also available to allow the information to be distributed to key people across your organisation. For further information please contact [andrew.fletcher@rer.co.uk](mailto:andrew.fletcher@rer.co.uk)



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