

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

Zollner, the leading indigenous European EMS provider with revenues of Euro 1.5 billion in 2020, has significant manufacturing in Germany, which is supported by low-cost operations in CEE and North Africa and as part of its “local for local” strategy has also expanded globally with two plants in the USA, supported by a low cost site in Costa Rica, and manufacturing operations in China to meet the demands of customers in the Asian market as well as offer low cost manufacturing for European customers.

Outside of Zollner, acquisitions have resulted in the emergence of a number of larger European EMS providers and over the period to 2025 further acquisitions will play an important role in the consolidation of the EMEA EMS industry with several of the leading European companies announcing plans to utilise them as a key part of their future growth strategies.

Since 2014, there have been several major pan-European acquisitions, with a further three announced in 2021.

- In 2014, the Dutch EMS provider Neways purchased of the German company BuS Elektronik.

- In 2015, Scanfil, with headquarters in Finland, acquired the Swedish company PartnerTech.

- The Danish company GPV's acquired the Swiss-headquartered CCS Holdings at the end of 2018.

- In 2021, the German company SERO acquired the Dutch company Solid Semecs, the Belgian Connect Group acquired Spain's IKOR while at the end of the year Norway's Kitron acquired BB Electronics, the deal being finalised in January 2022.

We have also seen, through a series of acquisitions, the emergence of KATEK as the second largest EMS provider in Germany. The last, the purchase of fellow German company Leesys, helped the company achieve revenues of over Euro 500 million in 2021.

The Twelfth 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 2020.
- A ranking of the Top 50 European-owned EMS providers in 2020 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.
- An overview of the structure of the European EMS industry and an outlook for the market through to 2025.
- A directory of the European manufacturing operations for the companies profiled in the report.

The Top 25 European-Owned EMS Providers

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

Note: Based on global revenues. Includes acquisitions announced in 2020/2021

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
BECOM
Bitron Electronics
BMK Group
Cicor
cms electronics
Connect Group
Darekon
Deltec Automotive
duotec Group
Electronica Cerla
Elemaster
Elrad
Enics
éolane
Fideltronik
GPV
HANZA
HAPRO
Incap
Inission
KATEK
Kitron
Kontron Electronics
LEAB
LACROIX Electronics
Matra Electronique
Melecs
MW.FEP
Neways
Noratron
NOTE
Orbit One
Pantel-Elektronik
Prettl Electronics
RAFI
RAWE Electronic
Scanfil
Selcom Group
Selha
Sero
SYNOV
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: 178

Related Reports

The European EMS Industry - A Strategic Market Analysis of the European Electronic Manufacturing Services Industry 2020-2025

The Eighteenth edition of **The European EMS Industry - A Strategic Market Analysis of the European Electronic Manufacturing Services Industry 2020-2025** 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 2025 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 2020.
- 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 2020 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 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.

For further information please contact andrew.fletcher@rer.co.uk or telephone +44 1235 227310



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



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