

## The European Electronic Manufacturing Services Industry 2016-2021

Whether directly involved as an EMS, OEM, or as a key supplier Reed Electronics Research's (RER) on-going research on the European EMS market provides in-depth knowledge on one of the key sectors of the European electronics industry.

In the latest European study, the fifteenth since the first report was published in 1993, RER provides an independent assessment of the European EMS industry looking at the key issues impacting the **Market** and the **Competitive Landscape** through 2016-2021.

### Market Data

Report includes: Revenue forecasts for 30 countries split across Western Europe, CEE and Middle East/North Africa (MENA) for 2016-2021; Market data by sector for Western Europe and CEE/MENA for 2016-2021; and an analysis of the key issues impacting the market

#### *Key findings include:*

- After a few years of no, or at best, very slow growth, the mood in the European EMS industry is more buoyant in 2017 and the prospects for further growth are good. The European EMS industry is forecast to reach Euro 32 billion by 2021, continuing the last 3 years of consecutive growth.
- EMS revenues in Western Europe grew for the second year running to an estimated Euro 11.2 billion and are forecast to grow over the next 5 years at a compound average annual rate of 2.8%, with good growth expected from Aerospace & defence, Automotive, Medical, Control & Industrial and telecom (ADAMCIT) sectors of the market.
- There are however, constant pressures on price and the transfer of production from Western European plants to manufacturing facilities in CEE/MENA will continue. EMS will also be under pressure from their global OEM customers to offer local manufacturing in other world regions and this will temper growth in some areas of Western Europe.
- The CEE/MENA region will continue to be focused on higher volume products in the consumer, computing and communications (3C) sectors due to the dominant position held by the major Group 1 Companies.
- The markets in Western Europe, although primarily served by domestic companies, will face increased competition as the larger Group 2 and 3 companies look to broaden their customer base.

### Company Data

Report includes Industry trends, Top 50 ranking of the leading European EMS providers and the Top 50 European owned EMS companies based upon 2016 revenues. There is also a comprehensive analysis of the leading EMS companies by country/region including rankings of the Top 15 companies for France, Germany, Southern Europe, the Nordic region, UK, CEE and the Top 7 in Israel.

#### *Key findings include:*

- There are over 1,000 EMS companies operating in total Europe but 80 of these constitute 80% of the revenues. The greater majority have below Euro 10 million annual revenues and serve mainly national markets.
- The top 6 Group 1 companies account for just over 50% of the total revenues in Europe but their main turnover is concentrated in CEE/MENA.
- Whilst average EMS revenues of Group 1 and Group 2 companies are slowly rising over the last 25 years, those for Group 3 and Group 4 companies remain flat.
- We are expecting that the recent trend of mergers and acquisitions in Groups 2, 3 and 4 will continue in 2018 and beyond as some companies find the joint trends of price pressure, and extra investment difficult to bear.
- OEM's will continue to demand more services from EMS providers, particularly in the design and development phases and in testing, logistics and product aftercare.
- A low-cost manufacturing facility in CEE/MENA is now a requirement for Group 2 and 3 companies and for the larger ones a global footprint is needed to meet customer requirements.

This comprehensive report provides:-

- A detailed market analysis to 2021 for Western Europe, CEE and North Africa in a single report.
- A breakdown of the market by major sector.
- An in-depth analysis and comment on the key market trends impacting the European EMS Industry.
- A ranking and detailed profiles of the Top 25 EMS providers in Europe.
- An overview of electronic production and EMS manufacturing in the major countries and regions including a ranking of the leading 15 EMS companies and profiles of the major players.
- A directory by country of the EMS manufacturing locations with addresses, contact numbers, websites.
- An appendix with the estimated sales turnover for 2016 of the Top 50 European EMS providers and the Top 50 European-owned EMS companies based on global revenues.

## Contents

### 1 Introduction

- 1.1 Scope & Methodology
- 1.2 Report Structure

### 2 Management Briefing

- 2.1 The European EMS Market 2016-2021
- 2.2 The Structure of the European EMS Industry
- 2.3 The Future for EMS in Europe

### 3 The European Market for Electronic Manufacturing Services

#### 3.1 Introduction

- The Political Context*
- The Economic Context*
- The Sociological Context*
- The Technological Context*
- The Legal and Environmental Context*

#### 3.2 The European EMS Market

- 3.2.1 Why outsource electronic manufacture to EMS ?
- 3.2.2 Forecast for EMS Revenues by Country and Regions
- 3.2.3 North West Europe
- 3.2.4 Southern Europe
- 3.2.5 Central and Eastern Europe, North Africa and Middle East
- 3.2.6 European EMS Revenues by Country
- 3.2.7 EMS Revenues by Market Sector
  - 3.2.7.1 Total Europe
  - 3.2.7.2 Central and Eastern Europe, North Africa and Other
  - 3.2.7.3 Western Europe
- 3.2.8 Sector Commentary
  - 3.2.8.1 Aerospace & Defence
  - 3.2.8.2 Consumer
  - 3.2.8.3 Communication and Networks
  - 3.2.8.4 Computer
  - 3.2.8.5 Medical
  - 3.2.8.6 Automotive
  - 3.2.8.7 Control, Instrumentation and Industrial

#### 3.3 A Strategic Analysis of the Major Trends Impacting the European EMS Market

- 3.3.1 The Major Trends and Issues for EMS
  - The outsourcing of electronic production*
  - Shortening Time to Market*
  - Production shifting to Lower cost Labour Locations*
  - Globalisation*
  - Regionalisation*
  - Economies of Scope & Scale*
  - Growing Sectors for European EMS*
  - Former Production Lost to Asia is Returning to the West*
  - The Attraction of German Speaking Markets*
  - Skill Shortages in the Whole of the Supply Chain*
  - IoT, Industry 4.0 as a "Virtual Manufacturing Company"*
- 3.3.2 Trends and Issues at the Company Level
  - Selling More Services to the OEM*
  - The EMS as "Manufacturing Expert"*
  - The Total Cost of Supply versus Unit Cost*
  - Earlier Involvement of the EMS*
  - Increased Manufacturing Complexity*
  - Does the EMS need to be Physically Close to its EMS Customers*
  - First Choose your Customer !*

#### 3.3.3 The Competitive Position for EMS in Europe

#### 3.3.4 Competition in Europe

#### 3.3.5 Competitive Pressures in the European EMS Industry

- Threat of New Entrants*
- Rivalry of Existing Competitors*
- Pressure from Substitutes*
- Bargaining Power of Buyers*
- Bargaining Power of Suppliers*

#### 3.4 The Key Issues Facing the European EMS Industry

#### 3.4.1 A Market with Low, or No Growth

#### 3.4.2 The Management of Risk

- Market Risks*
- Commercial Risks*
- Supply Chain Risks*

#### 3.4.3 The Pressure on Price

#### 3.4.4 The Assembly of Electronics and Testing

#### 3.4.5 The Search for Profitable Growth

#### 3.5 The Future for EMS in Europe

#### 3.6 Strategies for the Future

- Strategies for Group 1 Companies*
- Strategies for Group 2 Companies*
- Strategies for Group 3 Companies*

#### *Strategies for Group 4 Companies*

### 4 Major EMS Providers in Europe

- 4.1 The Role of the Global EMS
- 4.2 The Role of the European EMS
- 4.3 Acquisitions
- 4.4 Migration of Production to CEE/North Africa
- 4.5 Consolidation
- 4.6 Top 25 European EMS Providers
- 4.7 Profiles of the Top Twenty EMS Companies in Europe, North Africa & Middle East
  - 4.7.1 Foxconn
  - 4.7.2 Flex
  - 4.7.3 Jabil Circuit
  - 4.7.4 Zollner Elektronik
  - 4.7.5 Videoton
  - 4.7.6 Scanfil
  - 4.7.7 Asteelflash
  - 4.7.8 Neways
  - 4.7.9 Sanmina
  - 4.7.10 Enics
  - 4.7.11 Celestica
  - 4.7.12 ALL CIRCUITS
  - 4.7.13 éolane
  - 4.7.14 LACROIX Electronics
  - 4.7.15 Integrated Micro-Electronics
  - 4.7.16 Kitron
  - 4.7.17 BMK Group
  - 4.7.18 Leesys
  - 4.7.19 Fideltronik
  - 4.7.20 Elemaster
  - 4.7.21 TQ-Group
  - 4.7.22 Melecs
  - 4.7.23 Elemaster
  - 4.7.24 Katek
  - 4.7.25 Plexus

### 5 The European EMS Industry by Country/Region

#### 5.1 France

- 5.1.1 Electronics Industry Overview
- 5.1.2 EMS Market & Industry Trends
- 5.1.3 The Leading EMS Companies in France
- 5.1.4 Profiles of the Leading EMS Companies in France
  - 5.1.4.1 ALL CIRCUITS
  - 5.1.4.2 Asteelflash
  - 5.1.4.3 Capelec
  - 5.1.4.4 Cofidur
  - 5.1.4.5 éolane
  - 5.1.4.6 FEDD (Fabrication Electronique de Dordogne)
  - 5.1.4.7 LACROIX Electronics
  - 5.1.4.8 Laudron Electronique
  - 5.1.4.9 Matra Electronique
  - 5.1.4.10 Novatech
  - 5.1.4.11 RV Group
  - 5.1.4.12 Selha
  - 5.1.4.13 Seproelec
  - 5.1.4.14 Tronico ALCEN
  - 5.1.4.15 Viapaq

#### 5.2 Germany

- 5.2.1 Electronics Industry Overview
- 5.2.2 EMS Market & Industry Trends
- 5.2.3 The Leading EMS Companies in Germany
- 5.2.4 Profiles of the Leading EMS Companies in Germany
  - 5.2.4.1 Asteelflash
  - 5.2.4.2 bebro electronics
  - 5.2.4.3 BMK Electronics
  - 5.2.4.4 exceet Group
  - 5.2.4.5 Katek
  - 5.2.4.6 Leesys
  - 5.2.4.7 manufacturing, logistics & services
  - 5.2.4.8 Neways
  - 5.2.4.9 PRETTL Electronics
  - 5.2.4.10 ROB Centrex
  - 5.2.4.11 RSG Elotech
  - 5.2.4.12 Sanmina
  - 5.2.4.13 Sero
  - 5.2.4.14 Tonfunk
  - 5.2.4.15 TQ-Group
  - 5.2.4.16 TURCK duotec
  - 5.2.4.17 Zollner

#### 5.3 Southern Europe

- 5.3.1 Electronics Industry Overview

5.3.2 EMS Market & Industry Trends	5.6.4.13 Sanmina
5.3.3 Leading EMS Companies in Southern Europe	5.6.4.14 Solid Semecs
5.3.4 Profiles of the Leading EMS Providers in Southern Europe	5.6.4.15 SVI
5.3.4.1 Celestica	5.6.4.16 Variosystems
5.3.4.2 Dinema	5.7 Central and Eastern Europe (CEE), North Africa, Other
5.3.4.3 DM Elektron	5.7.1 CEE Electronics Industry Overview
5.3.4.4 EAS	5.7.2 EMS Market & Industry Trends
5.3.4.5 Elemaster	5.7.3 The Leading EMS Providers in CEE/North Africa
5.3.4.6 Eutron	5.7.4 Profiles of the Leading EMS Companies in CEE/ North Africa
5.3.4.7 Fagor Electronica	5.7.4.1 Benchmark Electronics
5.3.4.8 Flex	5.7.4.2 Celestica
5.3.4.9 IKOR	5.7.4.3 Enics
5.3.4.10 Jabil Circuit	5.7.4.4 Fideltronik
5.3.4.11 MADES	5.7.4.5 Flex
5.3.4.12 MB Elettronica	5.7.4.6 Foxconn
5.3.4.13 Microtel	5.7.4.7 Integrated Micro-Electronics
5.3.4.14 MW.FEP	5.7.4.8 Jabil Circuit
5.3.4.15 Selcom	5.7.4.9 Kimball Electronics
5.4 Nordic Countries	5.7.4.10 LACROIX Electronics
5.4.1 Electronics Industry Overview	5.7.4.11 Melecs
5.4.2 EMS Market & Industry Trends	5.7.4.12 Plexus
5.4.3 The Leading EMS Providers in the Nordic Countries	5.7.4.13 Sanmina
5.4.4 Profiles of the Leading EMS Companies to the Nordic Countries	5.7.4.14 Scanfil
5.4.4.1 BB Electronics	5.7.4.15 Videoton
5.4.4.2 Darekon	5.7.4.16 Zollner
5.4.4.3 Enics	5.7.4.17 Other Companies
5.4.4.4 GPV	<i>Elrad</i>
5.4.4.5 Hadeland Produkter AS (HAPRO)	<i>HansaMatrix</i>
5.4.4.6 HANZA	<i>SIIX</i>
5.4.4.7 HP Tronic	5.7.5 Leading EMS Providers in Israel
5.4.4.8 Inission	5.7.5.1 Profiles of the Leading EMS Providers in Israel
5.4.4.9 Kitron	5.7.5.1.1 AL Technologies
5.4.4.10 Kyrel	5.7.5.1.2 Flex
5.4.4.11 LEAB	5.7.5.1.3 Nistec
5.4.4.12 Norautron	5.7.5.1.4 PCB Technologies
5.4.4.13 Norbit	5.7.5.1.5 RH Technologies
5.4.4.14 NOTE	5.7.5.1.6 Sanmina
5.4.4.15 Orbit One	5.7.5.1.7 USR Electronic Systems
5.4.4.16 Sanmina	5.7.6 Leading EMS Providers in Turkey & North Africa
5.4.4.17 Scanfil	<b>6 Directory of European EMS Manufacturing Locations</b>
5.5 United Kingdom	<b>7 Appendix</b>
5.5.1 Electronics Industry Overview	7.1 Top 50 EMS Providers in Europe 2016
5.5.2 UK EMS Market & Industry Trends	
5.5.3 The Leading EMS Providers in the UK	
5.5.4 Profiles of the Leading EMS Companies to the UK	
5.5.4.1 Abaco Systems (Foundation Technology)	
5.5.4.2 Asteelflash	
5.5.4.3 AWS Electronics	
5.5.4.4 Axiom Manufacturing Services	
5.5.4.5 Axis Electronics	
5.5.4.6 Chemigraphic	
5.5.4.7 Elite Electronic Systems	
5.5.4.8 Fabrinet UK	
5.5.4.9 Jabil Circuit	
5.5.4.10 JJS Manufacturing	
5.5.4.11 Plexus	
5.5.4.12 Raytheon	
5.5.4.13 SMS Electronics	
5.5.4.14 Sony Electronics Technology Centre	
5.5.4.15 Stadium Electronics	
5.5.4.16 Surface Technology International	
5.5.4.17 TT Electronics-IMS	
5.5.4.18 Ultra Electronics CEMS	
5.6 Rest of West Europe	
5.6.1 Electronics Industry Overview	
5.6.2 EMS Market & Industry Trends	
5.6.3 The Leading EMS Companies in the Rest of Western Europe	
5.6.4 Profiles of the Leading EMS Companies in the Rest of Western Europe	
5.6.4.1 BECOM	
5.6.4.2 Benchmark Electronics	
5.6.4.3 CCS Group (CCS Customer Care & Solutions Holding AG)	
5.6.4.4 Celestica	
5.6.4.5 Cicor Technologies	
5.6.4.6 cms electronics	
5.6.4.7 Connect Group	
5.6.4.8 Enics	
5.6.4.9 Flex	
5.6.4.10 Jabil Circuit	
5.6.4.11 Melecs	
5.6.4.12 Neways	

No. of Pages: 412

No. of Tables: 42

No of Figures: 75

### Who will benefit

- Distributors and manufacturers of electronic components and materials - the profiles and directory provide a detailed analysis of potential customers, highlights growth markets by sector and country/region. The understanding and interpreting of 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 and provide location information.

- OEMs – A comprehensive guide to the major EMS companies in Europe in detail and further listing of EMS companies by geographic location.

- 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 from 2014 to 2019

- 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.

## Related Research

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

Annual report providing a strategic analysis of the Top 50 European EMS providers in Europe and the leading 50 European EMS based on global revenues. The report provides a ranking by revenue for 2016, detailed company profiles and a directory of their European manufacturing facilities.

*Publication Date: January 2018*

*Price: £550/Euro 660*

*For a limited period the price includes an annual subscription to European Electronic Markets Forecast (see below)*

### European Electronic Markets Forecast (EEMF)

Published since 1996, EEMF provides a combination of market analysis, industry overviews and company news to keep you fully informed of the latest developments in the European and global electronics industry. Designed to save you time and resources the report can quickly be distributed via email to the key decision makers within your company.

*Publication Date: Monthly*

*Price: £450/Euro 540*

*Introductory price £360/Euro 435*

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### The European Electronics Industry - European Electronics Production 2000-2020

As part of its programme of research covering developments in the European electronics industry, RER has released a new statistical database providing a medium term outlook for electronics production in Europe. Covering the period 2000-2020 the research allows you to track developments both geographically and by major product group for 29 countries.

*Publication Date: September 2017*

*Price: £995/Euro 1,195.*

### Custom Research

In addition to its published reports, RER offers bespoke client research and consultancy services on the European and global electronics industry, including in-depth industry presentations for internal sales and marketing meetings.

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## THE EUROPEAN EMS INDUSTRY 2016-2021 Order Form

	Report	Report & CD
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