# The UK EMS Industry 2019-2024

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## Report Synopsis

Despite the successful roll-out of the vaccine in the UK over the first half of the year, the on-going uncertainties surrounding COVID-19 globally will remain throughout 2021 and into 2022. The current global shortage of semiconductors and other components and materials will also remain an issue throughout 2021 and into 2022. As a result, the prospects of a broad recovery are now not expected until the final quarter of 2021 and potentially into the first half of 2022. As a result, we now expect growth in UK EMS revenues to be around 3.0% in 2021, with significant downside risks, but then should accelerate over the period to 2024 and reach £1,250 million at the end of the forecast period.

The UK EMS industry is focused on the aerospace and defence, including security, medical, control & instrumentation, industrial, energy, including renewable, cleantech and transportation industries. For EMS companies these sectors will provide significant opportunities. They are highly fragmented with few large- volume manufactures and a large number of small and medium sized companies often working in niche markets. Their demand is centred on high mix, low to medium volume production that can be supported, certainly in the industrialisation stage but often through the complete product life cycle, by UK manufacturing. To achieve this however, EMS companies will need to invest in the latest technologies to remain competitive.

Within the UK the EMS industry there are around 250 companies with UK manufacturing operations with the Top 5 companies accounting for 24.8% of UK EMS revenues in 2019 and the Top 10 37.7%. Foreign-owned companies hold a major share accounting for, after taking into recent acquisitions, 36% of UK generated EMS revenues in 2019, and accounted for five of the Top 10, including the top 4 and twelve of the Top 30.

Foreign-owned companies pose a  significant threat to the leading UK-owned EMS providers by being able to utilise their UK manufacturing operations for prototyping/NPI and then move volume production offshore to take advantage of lower costs or to produce in the market of consumption.

UK EMS companies have in general been resilient to the difficult operating which have impacted the industry, most notably during the downturn in 2008/2009, the sluggish market witnessed between 2012-2015 and the recent impact of COVID-19. However, with government support schemes still in place and with demand across several end market still subdued it will be a number of months before we see if there will be rise in the number of bankruptcies due to the pandemic.

It is expected that there will be  consolidation within the industry over the next five years through a combination of closures due to financial reasons, through acquisitions and as long established family-owned business  look for exit strategies.

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This fully updated report, a part of Reed Electronics Research's series of studies on the European Electronic Manufacturing Services (EMS) Industry provides a strategic assessment of the UK EMS industry for the period 2019-2024 and includes:

- EMS revenue forecasts through to 2024 for the UK and summary data for Europe.

- An overview of the key markets and drivers for the UK EMS  industry.

- A ranking of the Top 30 EMS providers with UK manufacturing facilities & the Top 20 based on global revenues.

- Profiles of the leading 46 UK EMS providers.

- A directory of over 240 UK EMS manufacturing facilities.

## Contents



**No of Pages: 100**

## Who will benefit

RER's Series of reports on the Electronics Manufacturing Services (EMS) industry 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 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 the UK.

- EMS – The report provides a complete overview of the UK EMS industry, including revenue forecasts, competitor information and the trends which will have an impact on business in the period to 2024.

- 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.

*RER published its first study on the European EMS industry in 1993 and since then has tracked the development of the industry through a series of comprehensive reports. We also provide custom reports and consultancy to meet your specific information needs. For further information please visit* ***www.rer.co.uk or contact andrew.fletcher@rer.co.uk***

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