This new 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 2012-2017. It is published at a time when there is growing optimism across both the UK and European EMS industries that, despite still limited visibility, a sustainable recovery will gain momentum during the course of 2014.

The UK EMS industry is well positioned to benefit as the recovery strengthens over the coming months. The country has a strong position in a number of sectors which have the potential for healthy growth, including aerospace and defence, energy, medical, automotive and the emerging cleantech sector.

The move to outsource manufacturing to low cost locations has been one of the major trends in the UK electronics industry resulting in the demise of the majority of high volume manufacturing over the last 10 years. Fears that companies would look to migrate shorter run production to lower cost locations has to some extent not materialised with companies now looking at the overall cost with companies reshoring some manufacturing back to the UK.

Benefits of manufacturing in the UK include lower logistical costs, the introduction of beneficial tax incentives by the government to support local manufacturing, higher quality and local technical support, shorter lead times, the flexibility to quickly react to changes in customer demands and more secure intellectual property.

Also, with the growth markets in the UK mirroring those of Western Europe it is expected that competition from the larger European and global EMS providers will increase over the period. With greater resources, including access to financing to fund growth, in particular in the early stages of new programmes, the companies are in the position to target the larger UK customers. Although smaller in size, UK EMS providers are also expected to increasingly look outside the UK for business, in particular in areas where they hold in-house expertise such as aerospace and defence.

In our analysis of the UK EMS industry we have identified around 230 companies operating some 240 manufacturing facilities and estimate that the actual number of companies is over 250. Although there have been a number of casualties in general the companies have been resilient to the difficult operating environment which impacted the industry both at the end of 2008/2009 and again in 2012. However, it is expected that some consolidation will occur during the period to 2017.

The UK EMS Industry 2012-2017 report provides an independent strategic assessment of the UK EMS market and includes:

- EMS revenue forecasts through to 2016 for the UK and Europe.
- An overview of the key markets and drivers for the UK EMS industry.
- A ranking of the Top 25 EMS providers with UK manufacturing facilities.
- Profiles of the leading 31 UK EMS providers.
- A directory of around 240 UK EMS manufacturing facilities.
### 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 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 2012 to 2016.

- 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](http://www.rer.co.uk) or contact andrew.fletcher@rer.co.uk*

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### THE UK EMS INDUSTRY 2011-2016

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European & UK Customers: Please state your VAT number:

*For UK customers VAT of 20% will be applied*

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For the full range of reports produced by RER, including data on the electronics industry in 53 countries globally, please visit: [www.rer.co.uk](http://www.rer.co.uk)