

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

Zollner, the leading indigenous European EMS provider had global EMS revenues of Euro 1.7 billion in 2021, and the only European-owned EMS provider with sales above Euro 1 billion. GPV was ranked second after taking into account the acquisition of Enics which was completed in October 2022. Revenues for the two companies operations exceeded Euro 1 billion in 2022 the company having extensive manufacturing operations in Europe and Asia and a smaller operation in Mexico.

Other significant acquisitions include Kitron's purchase of the Danish EMS provider BB Electronics which was completed at the beginning of 2022, while in 2021 Germany's SERO acquired the Dutch company Solid Semecs and the Belgian Connect Group purchased Spain's IKOR.

The Swiss company Cicor moved to 16th in the ranking, the company making strategic acquisitions in both Germany and the UK. Other companies have also expanded their operations in Europe through smaller acquisitions including in the Swedish companies HANZA, Inission and NOTE.

To support customers requirements for a local manufacturing presence three of the Top 10 have made significant acquisitions in North America - Zollner, KATEK and LACROIX Electronics in 2021/2022.

In 2021, the Top 50 European-owned companies generated revenues of just under Euro 10 billion from their EMEA manufacturing operations and accounted for 28.8% of the total EMEA market.

With extensive volume manufacturing operations in Europe the Top Three EMS providers in EMEA in 2021 - Foxconn, Flex and Jabil - had estimated revenues of 12.4 billion while the 12 non-EMEA companies in the Top 50 ranking accounted for 44% of the total.

The Thirteenth 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 EMEA providers in 2021
- A ranking of the Top 50 European EMS providers in 2021 based on global revenues.
- A ranking of the Top 50 European-owned EMS providers in 2021 based on global revenues and taking into recent acquisitions
- Detailed profiles of the Top 50 European EMS providers, the leading EMS companies in Israel and the Top 12 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 2026.
- A directory of the European manufacturing operations for the companies profiled in the report.

The Top 25 European-Owned EMS Providers in 2021 based on Global Revenues

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

Note: Based on global revenues. Includes acquisitions announced in 2021 through to March 2023

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.

Contents

1 The EMEA EMS Industry

- 1.1 EMEA Market Overview
- 1.2 The Structure of the EMEA EMS Industry
- 1.3 The Role of the Global EMS
- 1.4 The Role of the European EMS
- 1.5 Acquisitions
- 1.6 The Move to a Global Manufacturing Footprint
- 1.7 Consolidation

2 Rankings

3 Profiles of the Leading European EMS Providers

ALL CIRCUITS
BECOM
Bitron Electronics
BMK Group
Bosch EMS
Cicor
cms electronics
Connect Group
Darekon
Deltec Automotive
duotec
Electronica Cerla
Elemaster
Elrad
éolane
Fideltronik
GPV
HANZA
Incap
Inission
KATEK
Kitron
Kontron Electronics
LACROIX Electronics
LEAB
Matra Electronique
Melecs
MW.FEP
Neways
Norautron
NOTE
NVision
Orbit One
Pantel-Elektronik
Prettl Electronics
RAFI
RAWE Electronic
Rimaster
Scanfil
Selcom Group
Selha
Sero
SYNOV
Teltonika EMS
Tonfunk
TQ-Group
TT Electronics
Variosystems
VIDEOTON
Zollner

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

Asteelflash	AL Technologies
Benchmark	ATM Electronics/PCB Technologies
Celestica	Nistec
Flex	RH Technologies
Foxconn	USR Electronic Systems
Integrated Micro-Electronics	
Jabil	
Kimball Electronics	
Plexus	
Sanmina	
SIIX	
SVI	

4 Directory of Manufacturing Facilities

No of Pages: 180

Related Reports

[The European EMS Industry - A Strategic Market Analysis of the European Electronic Manufacturing Services Industry 2021-2026](#)

The Twentieth edition of **The European EMS Industry - A Strategic Market Analysis of the EMEA Electronic Manufacturing Services Industry 2021-2026** highlights the issues impacting the EMEA 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 2026 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 companies in 2021.
- A directory by country of around 2,200 EMS manufacturing locations, contact numbers, websites etc.
- A ranking of the top 50 EMS in EMEA in 2021 by turnover plus a ranking of the Top 50 European-owned EMS companies based on global revenues including one which takes into account recent acquisitions.

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



www.rer.co.uk

THE EUROPEAN EMS INDUSTRY Top 50 - Order Form

	Sterling	Euro
The European Electronic Manufacturing Services Industry - A Strategic Analysis of the Top 50 European EMS Providers PDF	£595	Euro 685
European Customers: Please state your VAT number:		
The cost for a multi-user license which allows the report to be distributed electronically across all the company's locations is £1,190/Euro 1,370		

Delivery Address

Name

Position

Address

City:

Postcode/Zip:

Country

Tel:

Fax:

Email Address:

Payment

Please charge my MasterCard, Visa American Express Card

Cardholder Name:

Cardholder Address:

Expiry Date:

Card Number:

Security Number:

Please invoice me: Company Purchase Order No:

Return to Orders Department:

Fax: +44 (0) 1235 420515/Tel: +44 (0) 1235 227310

Email: Orders@rer.co.uk

To order on-line please visit www.rer.co.uk