

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

Taking into account recent acquisitions, two European-owned companies would have had revenues over Euro 1 billion in 2022, GPV joining long-term Number One Zollner following the completion of its acquisition of Enics at the beginning of October 2022.

The Austrian IoT solutions provider Kontron has entered into the Top Ten following the acquisition of the second largest German EMS provider KATEK in the first quarter of 2024 while HANZA has also entered into the Top 10 following the purchase of fellow Swedish company Orbit One in January 2024.

Cicor moved to 13th in the ranking following two further acquisitions, the Swiss company now the leading EMS provider in the UK following the purchase of TT Electronics' UK PCBA manufacturing operations. Globally, TT Electronics remains within the Top 50 with production facilities in the US and Asia. In France, Agôn Electronics entered the Top 50 following the purchase of fellow French company Tronico-ALCEN while additional acquisitions have been made by the Nordic companies NOTE in the UK and Inission in Norway.

To meet customer's requirements for local production the major European-owned companies have and will continue to invest in extending their global manufacturing presence.

In 2022, the Top 50 European-owned companies generated revenues of Euro 13 billion from their EMEA manufacturing operations and accounted for 29.5% of the total EMEA market.

With extensive volume manufacturing operations in Europe the Top Three EMS providers in EMEA in 2022 - Foxconn, Flex and Jabil - had estimated revenues of Euro 16.3 billion while the 12 non-EMEA companies in the Top 50 ranking accounted for 45% of the total.

The Fourteenth 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 2022
- A ranking of the Top 50 European EMS providers in 2022 based on global revenues.
- A ranking of the Top 50 European-owned EMS providers in 2022 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 2027.
- A directory of the European manufacturing operations for the companies profiled in the report.

The Top 25 European-Owned EMS Providers in 2022 based on Global Revenues

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

Note: Based on global revenues. Includes acquisitions announced in 2022 through to March 2024

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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- 1.6 The Move to a Global Manufacturing Footprint
- 1.7 Consolidation

2 Rankings

3 Profiles of the Leading European EMS Providers

Agôn Electronics
ALL CIRCUITS
Alliance Electronics
BECOM
Bitron Electronics
BMK Group
Bosch EMS
Cicor
cms electronics
Connect Group
Darekon
Deltec Automotive
Diehl Controls
duotec
Elemaster
Elrad
éolane
Fideltronik
GPV
HANZA
HAPRO
Incap
Inission
Kitron
Kontron
LACROIX Electronics
Leab
Matra Electronique
Melecs
MW.FEP
Neways
Norautron
NOTE
Nvision
Pantel-Elektronik
Prettl Electronics
RAFI
RAWE Electronic
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 2022-2027](#)

The Twenty First edition of **The European EMS Industry - A Strategic Market Analysis of the EMEA Electronic Manufacturing Services Industry 2022-2027** highlights the issues impacting the EMEA EMS industry and provides an update to RER's regular annual report on the industry which was first published in 1993.

This comprehensive report provides:-

- Detailed market analysis to 2027 for Western Europe, CEE and North Africa/Israel in a single report
- Breakdown of the West European and CEE/MENA 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 2022.
- A directory by country of around 2,300 EMS manufacturing locations, contact numbers, websites etc.
- A ranking of the top 50 EMS in EMEA in 2022 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.

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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.

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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.

EEMF provides:

- The latest company developments and market analysis in a single-source.
- Regular 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.

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