



REED  
ELECTRONICS  
RESEARCH

## THE YEARBOOK OF WORLD ELECTRONICS DATA

Components  
Computers  
Consumer  
Control and Instrumentation  
Medical and Industrial  
Office Equipment  
Radio Communications  
Telecommunications

Volume Two  
**AMERICAS, JAPAN, ASIA PACIFIC**

# 2024

## Yearbook of World Electronics Data Volume 2 2024 – An Overview of Electronics Production & Markets in the Americas, Japan & Asia Pacific

In providing the forecasts for the current study, which were made in September, we have:

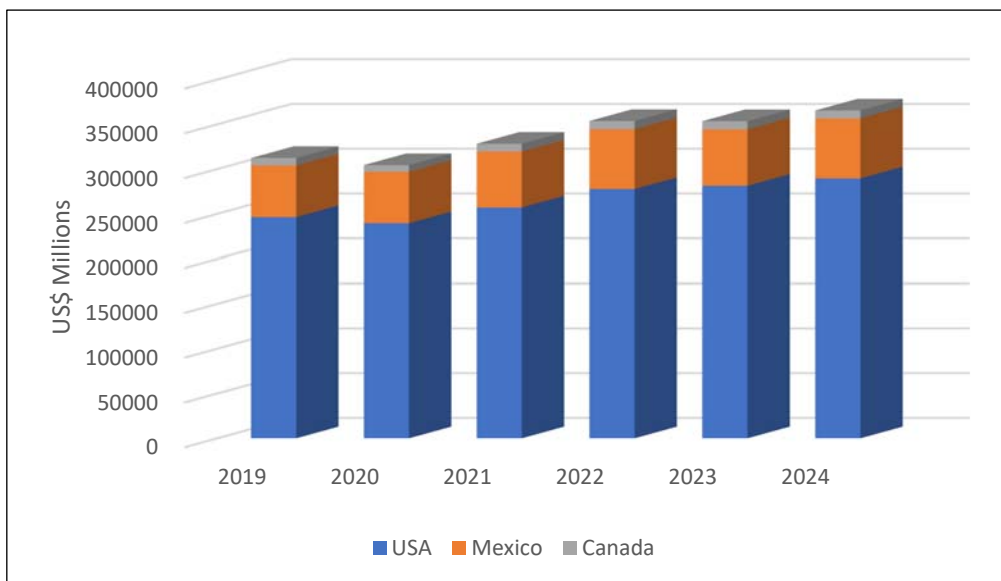
- Considered developments in the global economy, notably the slowdown in the final quarter of 2023 and the subdued outlook for 2024.
- The build-up of inventory over the course of 2023, which combined with weaker demand across several end markets, fed through to lower equipment production, with on-going inventory balancing continuing through the majority of 2024.
- Component prices and shortages eased over the course of 2023 and are expected to normalise in 2024.
- Although several countries are benefiting from the rebound in the computer and smartphone markets and the surge in demand for related components, particularly for memory, we expect growth across the remainder of the electronics industry to recover in the first quarter of 2025 and then gain momentum over the period to 2027. However, as in previous years significant downside risks remain.

The forecasts for 2024 through to 2027 are based on constant 2023 exchange rates and prices and therefore exclude the impact of inflation.

### Americas

Within the Yearbook series the Americas covers Brazil and the three countries making-up North America.

In 2023, electronics production in North America amounted to US\$354 billion with the US dominating accounting for 79.6% of the total. Mexico, which acts as the low-cost production base for the region, 17.8% while Canada accounted for only 2.6%. After increasing in US dollars by 7.8% in 2022, growth declined by a modest 0.1% in 2023 and is forecast to increase by 3.4% in 2024.



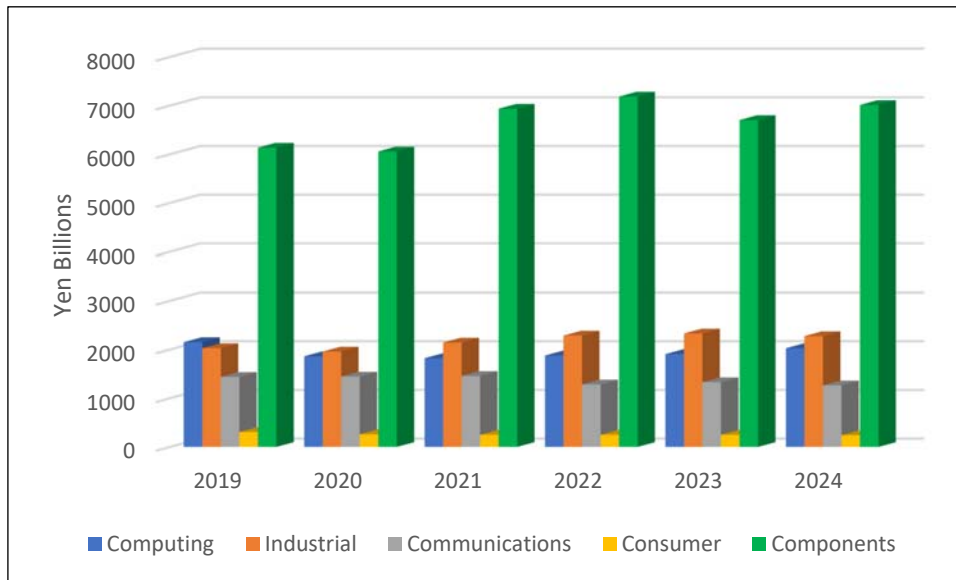
*North American Electronics Production by Country 2019-2024*

Growth in the Brazilian electronics industry will continue to be closely linked with developments in the country's economy along with continued investment by the world's largest electronics groups in the 3C and electronic manufacturing

services segments. With limited prospects for major investments the components sector will remain dependent on the import of electronic components.

**Japan**

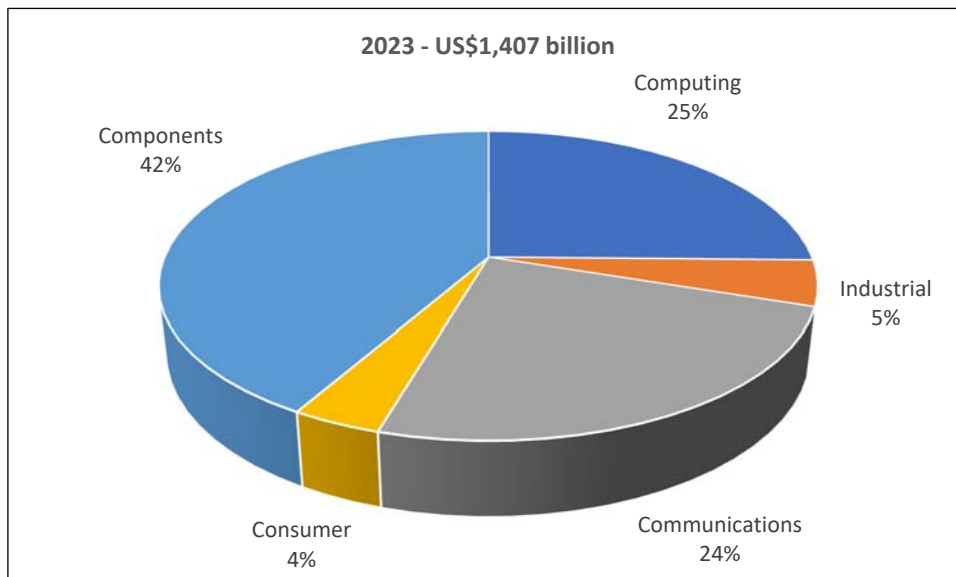
Electronics production, after two years of consecutive growth, fell by 2.8% in 2023, an increase of 2.1% in electronics equipment output was offset by a 6.7% decline in components production.



*Japan Electronics Production by Sector 2019-2024*

The semiconductor and passive components sectors will continue to be the principal drivers of the Japanese electronics industry over the medium-term with the focus on products based on the latest technologies and continued investment in new capacity. The component sector will be supported by growth in the industrial segment, the emergence of new communication products driven by Internet of Things and 5G and the computer segment, in particular products supporting the development of AI.

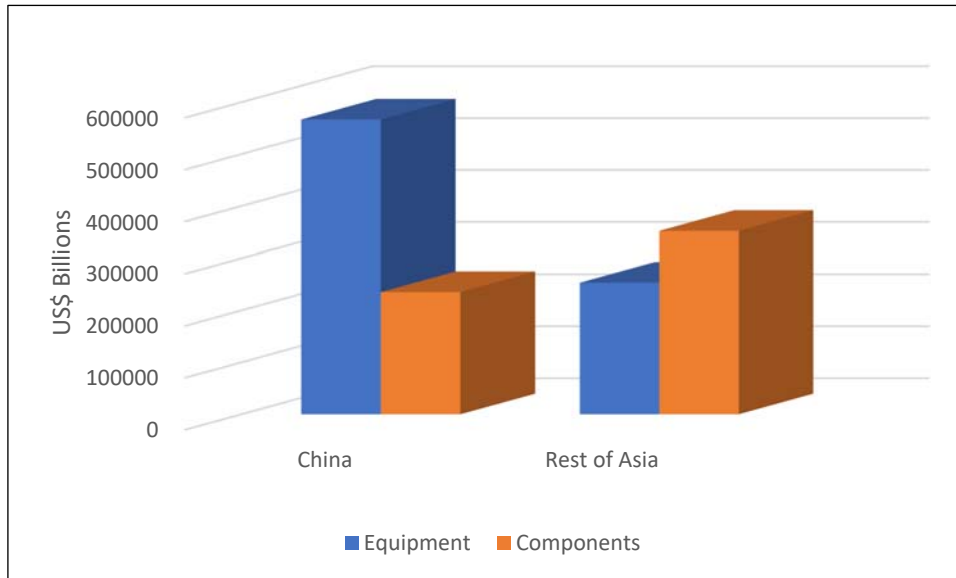
**Asia**



*Asian Electronics Production by Sector 2023*

In 2023, the production of electronics equipment and components in Asia was valued at US\$1,407 billion of which electronics equipment production accounted for 58.3% of the total with output dominated by computing and communications. Asia is also the centre for electronic component output globally.

China dominates electronics production in the region with total electronics output valued at US\$802 billion in 2023. South Korea and Taiwan, with their strong focus on semiconductors, both reported electronics production of over US\$100 billion in 2023 at US\$132 billion and US\$130 billion, respectively while Singapore with output of US\$88 billion and Malaysia US\$76 billion also benefited from an established semiconductor industry. Vietnam, which due to its low-costs has seen explosive growth in recent years, is a major centre for the production of mobile phones with overall electronics output of US\$82 billion in 2023. Electronics production in India was valued at US\$38 billion in 2023 growth being supported by government incentives as the country looks to establish itself as a major global manufacturing hub.



*China Share of Asian Electronics Production 2023*

### ***The Yearbook of World Electronics Data – tracking developments in the global electronics industry***

With a history spanning 50 years the Yearbook of World Electronics Data has provided an invaluable insight into the global trends, regional variations and the underlying state of the global electronics market for all stages of the supply chain - OEM, contract manufacturing and design, components and materials suppliers to financial /industry analysts and government and academia.

Although encompassing a range of published and bespoke products the core of RER's research programme is one of the most comprehensive statistical databases covering the global electronics industry, with the resulting analysis being published through three concise and clear demographic volumes, as a series of individual country reports, through customised solutions to meet specific client requirements and, from 2012, as a series of Excel databases providing the combination of both historical and forecasted data.

### **Yearbook of World Electronics Data - Volume 2 Americas, Japan, Asia Pacific**

Published since 1983 Volume 2 of the Yearbook of World Electronics Data provides:

- A single source solution allowing you to track the electronics industry in 19 countries in the Americas, Japan and Asia Pacific.
- 13 major product groups.
- Market and production forecasts.
- CD-option allows you to manipulate the data quickly and easily: produce your own subsets or summaries of the data, create your own forecasts or cut and paste the data into your own in-house reports and presentations.

## **Who will benefit ?**

The Yearbook is essential research providing key data for all areas of the electronics industry including:

- Distributors and manufacturers of electronic components and materials.
- Suppliers of electronic production equipment.
- OEMs.
- EMS Providers.
- Government, including investment organizations.
- Financial and industry analysts.
- Academic institutes & universities tracking developments in the electronics industry.

### ***The Yearbook of World Electronics Data – tracking developments in the global electronics industry***

With a history now extending over 50 years, the first edition of the Volume 1 of the Yearbook of World Electronics Data was first published in 1973, the Yearbook series has been extended to cover 53 countries globally to provide an invaluable and unique insight into the global trends, regional variations and the underlying state of the global electronics market for all stages of the supply chain - OEM, contract manufacturing and design, components and materials suppliers to financial /industry analysts and government and academia.

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### ***53 country coverage, 13 major product groups***

... comparable **country by country** and **product by product**.

### ***Methodology***

The Yearbooks highlight market trends and opportunities and offer corroborative evidence for individual research. Each new edition is fully revised and updated. Trade statistics are analyzed in detail, with over 500 separate categories being employed. Production statistics are collected from Government and Manufacturer's Association sources where these are available. Extensive use is also made of research reports, company reports, news items and work by other consultants to supplement and cross-check the official and semi-official sources.

Markets are forecast in real terms through to 2026, with production forecast to 2023, using constant exchange rates and excluding inflation. These are based on our extensive knowledge of the historical performance of each product, the general economic outlook and the major growth influencing factors.

### ***2024 Series***

#### **Volume 1 2024 West Europe**

Synopsis: Economic Overview; Electronics Market Overview; Imports 2021-2022; Exports 2021-2022; Production Data 2021-2024; Market Data 2021-2027

16 country coverage

Austria; Belgium; Denmark; Finland; France; Germany; Greece; Ireland; Italy; Netherlands; Norway; Portugal; Spain;

Sweden; Switzerland; UK

Publication Data: July 2024

### **Volume 2 2024 America, Japan, Asia Pacific**

Synopsis: Economic Overview; Electronics Market Overview; Imports 2021-2022; Exports 2021-2022; Production Data 2021-2024; Market Data 2021-2027

19 country coverage

Australia; Brazil; Canada; China, Hong Kong; India; Indonesia; Israel; Japan; Malaysia; Mexico, Philippines; Singapore; South Africa; South Korea; Taiwan Thailand; Vietnam, USA

Publication Data: September 2024

### **Volume 3 2024 East Europe & World Summary**

Synopsis: Economic Overview; Electronics Market Overview; Imports 2021-2022; Exports 2021-2022; Production Data 2021-2024; Market Data 2021-2027

53 Country World Summary covering production data 2021-2024 and market data for 2021-2027

13 country coverage

Bulgaria; Croatia; Czech Republic; Estonia; Hungary; Lithuania; Poland; Romania; Russia; Slovakia; Slovenia; Turkey, Ukraine

Publication Data: October 2024

For each country production and market data is supplied for the following product groups:

- Computers
- Consumer – Video; Audio; Personal
- Control & Instrumentation
- Medical & Industrial
- Office Equipment
- Radio Communications
- Telecommunications
- Components – Passive Components; Semiconductors; Other Components

### **Related Products & Services**

#### ***European Electronics Production 2001-2027***

As part of its program 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 2000-2027, the research allows you to track developments both geographically and by major product group.

The database is provided as an Excel spreadsheet providing production data for 13 product groups and 29 countries split by Western Europe and Central and Eastern Europe.

#### ***Global Electronics Production & Markets***

Launched in 2012, Global Electronics Production & Markets provides top line analysis on the global electronics industry for the period 1995 to 2027 for markets and 1995-2024 for production. Through two Excel databases you can quickly analyze the structure of the global industry and how it has changed both geographically, through RER's unique coverage of 53 countries, and by thirteen major product groups. The new database will be available in October 2024.

#### ***Country Reports***

Drawing on data from its core statistical database RER provides a quick, reliable and cost-effective assessment of the electronics industry for an individual country. For a full listing please visit [www.rer.co.uk](http://www.rer.co.uk)

***Custom Research***

Building on the flexibility of the two databases and the Yearbook series we can quickly search data by product or country/region to provide solutions tailored to your specific needs or budgets. Ideal for input into internal presentations/ documents the data is supplied via email.

**For additional information on the above publications or Reed Electronics Research's complete range of research products please contact or visit [www.rer.co.uk](http://www.rer.co.uk)**

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## SAMPLE DATA

Over the following pages we provide sample data from the **current** edition of the report. This includes summary data for both production and markets, and sample data from several countries.

### CONSOLIDATED SUMMARY OF PRODUCTION 2023

Country	\$M Computing	\$M Office Equip	\$M Control & Instr	\$M Medical & Industrial	\$M Radio Comms & Radar*	\$M Telecomm- unications	\$M Consumer	\$M Compo- nents	\$M TOTAL
Australia	563	4	927	235	1079	695	20	396	3920
Brazil	7379	169	1751	377	5000	880	1777	2007	19340
Canada	533	5	3259	978	3444	246	7	741	9214
China	262000	3450	21200	13300	176000	54000	36670	235245	801865
Hong Kong	111	8	46	125	104	89	234	368	1085
India	3995	105	2427	766	23547	1695	3823	1892	38251
Indonesia	1750	39	310	414	2250	1600	2511	3896	12770
Israel	1290	9	3180	1775	1400	1580	18	4892	14144
Japan	13132	441	9765	6826	7929	1537	1779	47722	89132
Malaysia	11320	55	6404	1124	1316	3070	2142	50636	76066
Mexico	31800	127	3700	2254	3000	3500	12880	5785	63046
Philippines	3500	91	800	275	800	700	194	9474	15834
Singapore	8284	114	5821	1222	2985	434	172	68720	87752
South Africa	293	1	114	71	173	192	149	99	1093
South Korea	9840	127	2950	2550	13630	1092	1057	100872	132118
Taiwan	21923	9	577	3667	6731	1635	414	94824	129780
Thailand	11748	199	802	378	745	2536	1419	11694	29521
USA	29454	820	48805	35580	88440	8303	701	69145	281248
Vietnam	17250	134	1004	1049	36761	12359	3851	9815	82223
<b>TOTAL</b>	<b>436164</b>	<b>5908</b>	<b>113842</b>	<b>72966</b>	<b>375335</b>	<b>96144</b>	<b>69819</b>	<b>718224</b>	<b>1888402</b>

### CONSOLIDATED SUMMARY OF MARKETS 2023

Country	\$M Computing	\$M Office Equip	\$M Control & Instr	\$M Medical & Industrial	\$M Radio Comms & Radar*	\$M Telecomm- unications	\$M Consumer	\$M Compo- nents	\$M TOTAL
Australia	7383	181	2820	1309	5021	1557	1704	2972	22948
Brazil	10280	141	4887	1320	5981	1627	2199	12724	39159
Canada	9870	261	3623	2439	4975	2854	2181	4285	30489
China	116130	752	36542	13117	40781	15223	12705	293253	528503
Hong Kong	3383	31	327	229	940	325	583	1197	7015
India	9238	124	7149	1686	15845	2396	4651	28729	69820
Indonesia	3648	171	1783	779	6303	1683	1256	4714	20337
Israel	2958	30	833	1122	1782	272	404	2707	10108
Japan	26121	648	4370	4626	23900	6797	5060	50562	122085
Malaysia	2730	44	1768	418	1827	347	561	23070	30766
Mexico	11994	130	4233	1557	6757	888	2071	40797	68427
Philippines	1865	28	1334	291	1250	567	352	4524	10211
Singapore	10597	118	3071	471	3193	663	910	13631	32654
South Africa	2480	112	655	284	1573	770	231	1434	7539
South Korea	6208	88	6938	2649	5736	1857	1664	28507	53647
Taiwan	5134	42	4568	990	2754	567	556	18841	33453
Thailand	4706	64	2839	788	4136	926	1166	11866	26490
USA	122483	996	43719	34997	141015	26717	22854	116882	509663
Vietnam	2498	79	3377	653	4126	965	1069	54165	66932
<b>TOTAL</b>	<b>359706</b>	<b>4041</b>	<b>134837</b>	<b>69726</b>	<b>277896</b>	<b>67001</b>	<b>62178</b>	<b>714862</b>	<b>1690246</b>