

# The UK EMS Industry

## 2023-2028



### Report Synopsis

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.

After increasing by 12.9% in 2022, when revenues were boosted by the carry-over of delayed orders from the prior year and the pass through of higher material and component prices at no margin, growth eased to 7.5% as component prices and shortages eased over the course of 2023 and since normalised in 2024. The build-up of inventory over the course of 2023, which combined with weaker demand across several-end markets, fed through to lower EMS revenues, with on-going inventory balancing continuing through the majority of 2024. The current forecast assumes that demand will recover over the later part of 2025 and then accelerate over the period to 2028

Based on the company's current organisational structure, in 2023, Cicor was the leading EMS provider based on revenues generated from manufacturing operations in the UK and was followed by Sony, Plexus, Elite Electronic Systems, Axiom, ESCATEC Mechatronics, and NOTE. The Top 5 companies accounted for 24% of UK EMS revenues in 2023 and the Top 10 38%.

Although TT Electronics Global Manufacturing Solutions division reported global sales of £252.8 million in 2024 (2023: £299.2 million) the company has scaled back its operations in the UK and following the sale of its operations in Hartlepool and Rogerstone retains only a small plant focused on cable harnesses in the country.

Overseas-owned companies accounted for 35% of UK generated EMS revenues in 2023, and accounted for the 7 of the Top 10 companies and 11 of the Top 20. Foreign-owned companies potentially 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.

The need to be competitive in both the latest technology and the range of services offered will make it difficult for UK companies with sales currently under £10 million to scale-up their activities. As a result, the UK EMS industry will continue to be characterised by a long tail of smaller companies.

This fully updated report provides a strategic assessment of the UK EMS industry for the period 2023-2028 and includes:

- EMS revenue forecasts through to 2028 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 15 EMS providers (including the impact of acquisitions), the Top 30 EMS providers with UK manufacturing facilities & the Top 20 based on global revenues.
- Profiles of the leading 44 UK EMS providers.
- A directory of over 280 UK EMS manufacturing facilities.

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Companies Profiled::

Agile Circuit Technologies; Asteelflash Bedford; Axiom Manufacturing Services; Challenger Solutions; Chemigraphic; Cicor; Cogent Technologies; Connor Solutions; Corintech; Custom Interconnect; Dynamic EMS; EC Electronics; Elite Electronic Systems; ESCATEC Mechatronics; Esprit Electronics; GH I ITL; Hindley Circuits; Hinchtech; Icon Electronics; Incap Electronics UK; Jaltek Holdings; Kelvinside Electronics; Kingfield Electronics; N.E.M.CO; NOTE; OSI Electronics; Pektron; Philtronics; Phoenix Systems; Plexus; Raytheon; Season Electronics; SMS – Smart Made Simple; Sony UK Technology Centre; Surface Technology International; TechPoint Group; Tenstep; Texcel Technology; Tioga; TT Electronics; UK Circuits and Solutions; UK Electronics Group; Ultra CEMS; Wilson Process Systems

#### 5 Directory of UK EMS Manufacturing Locations

No of Pages: 104

## 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 2026.

- 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](mailto:andrew.fletcher@rer.co.uk)*



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