

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

2025

Yearbook of World Electronics Data Volume 2 2025 – An Overview of Electronics Production & Markets in the Americas, Japan & Asia Pacific

Introduction

In providing the forecasts for the current study, which were made at the end of July/beginning of August, we have:

- Taken into accounts developments in the European and global economy, and the on-going impact of tariffs on growth.
- That the impact of inventory balancing across several segments and notably industrial eased over the final months of 2024 with orders normalising in the first half of 2025.
- Component prices and shortages normalised in 2024 although tariffs have put pressure on prices in 2025.
- Consumer spending will remain subdued due to the combination of higher inflation and on-going geopolitical uncertainty.
- AI and data centre consumption will be a key driver of growth in the overall computer market in 2025 and 2026. We also expect demand to feed through to higher computer equipment production.

Americas

In 2024, electronics production in North America amounted to US\$359 billion with the US dominating accounting for 79.3% of the total. Mexico, which acts as the low-cost production base for the region, 18.2% while Canada accounted for only 2.5%. After declining in US dollars by 0.1% in 2023, growth increased by 4.3% in 2024 and is forecast to grow by a more substantial 8.2% in 2025.

In Canada the growth in electronics output after increasing by 8.6% and 4.3% in 2022 and 2023, respectively eased to 1.2% in 2024 in part due to lower demand from key export markets. Communications and radar and control and instrumentation represented the largest segments accounting for 36.1% and 35.7% of electronics output, respectively in 2024. The component segment is small, accounting for only 7.5% of output in 2024.

In US dollars electronics output in Mexico increased by 6.3% in 2024 with growth seen across the computing, industrial and communications segments. Growth is forecast to increase by a more robust 15.2% in 2025 led by a 30% increase in computer output on the back of growth in AI and data centre related spending, and a 6.7% increase in communications production with this offset by slower growth in industrial and an 8.0% decline in consumer video.

Mexico will continue to benefit from foreign investment as both OEMs and EMS/ODMs look to utilise low-costs sites in the country as a production base to serve the North American market. The focus will remain on electronics equipment with limited investment expected in expanding the country's electronic components ecosystem.

After growth of 3.9% in 2023 the production of electronics equipment eased to 1.5% in 2024 but is forecast to rebound and increase by 4.3% in 2025 while electronics component output is forecast to increase by 13.1% in 2025 after posting double-digit growth of 11.9% in 2024 and a 6.0% decline in 2023.

The move by US companies to "re-shore" production has gained momentum and is expected to benefit from the move by US companies to localise manufacturing to offset higher tariffs. However, the US will face competition from Mexico for high-volume manufacturing.

Japan

Electronics output increased by 5.6% in 2024, a marked improvement compared to the prior year's decline of 2.8%. Electronics equipment, which accounted for 44.7% of the total, increased by 1.6% while components increased by 9.0%.

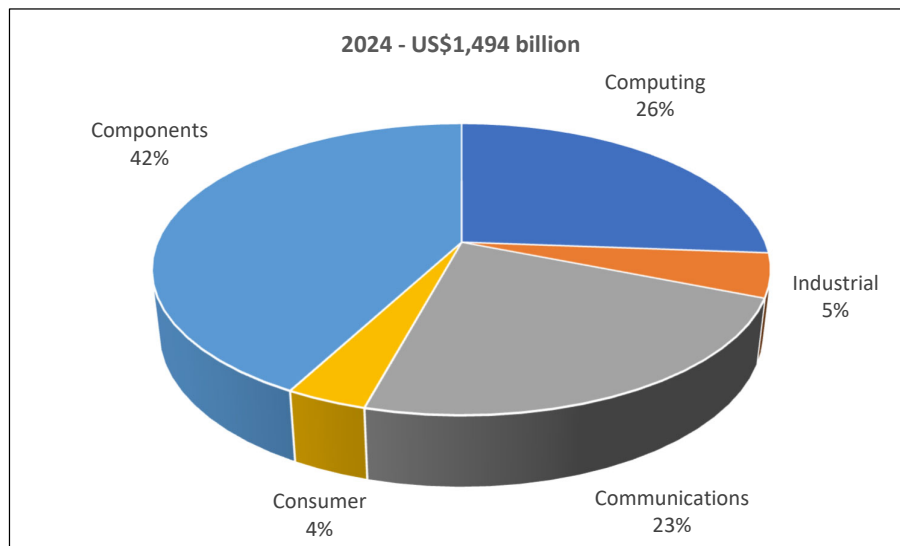
Based on official figures for the first six months of the year overall electronics output is forecast to increase by 1.9% in 2025, a 3.6% rise in electronic component production offset by a 1.9% increase in electronics equipment output.

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

In 2024, the production of electronics equipment and components in Asia was valued at US\$1,494 billion of which electronics equipment production accounted for 57.8% 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\$801 billion in 2024. Taiwan and South Korea, with their strong focus on semiconductors, both reported electronics production of over US\$150 billion in 2024 at US\$164 billion and US\$162 billion, respectively while Singapore with output of US\$92 billion and Malaysia US\$83 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\$81 billion in 2024. Electronics production in India was valued at US\$49 billion in 2024 growth being supported by government incentives as the country looks to establish itself as a major global manufacturing hub.



Asian Electronics Production by Sector 2024

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.

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 a series of Excel databases providing the combination of both historical and forecasted data.

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.

2025 Series

Volume 1 2025 West Europe

Synopsis: Economic Overview; Electronics Market Overview; Imports 2022-2023; Exports 2022-2023; Production Data 2022-2025; Market Data 2022-2028

16 country coverage

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

Publication Data: August 2025

Volume 2 2025 America, Japan, Asia Pacific

Synopsis: Economic Overview; Electronics Market Overview; Imports 2022-2023; Exports 2022-2023; Production Data 2022-2025; Market Data 2022-2028

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 2025

Volume 3 2025 East Europe & World Summary

Synopsis: Economic Overview; Electronics Market Overview; Imports 2022-2023; Exports 2022-2023; Production Data 2022-2025; Market Data 2022-2028

53 Country World Summary covering production data 2022-2025 and market data for 2022-2028

13 country coverage

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

Publication Data: October 2025

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 2000-2028

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 2000-2028 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 27 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 2028 for markets and 1995-2025 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 2025.

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

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

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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 2024

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	559	4	954	247	1118	724	20	408	4034
Brazil	7937	125	1700	334	4900	830	1666	1971	19463
Canada	677	4	3285	1004	3321	204	7	685	9188
China	268000	3470	22500	14500	179000	51500	37855	224400	801225
Hong Kong	114	6	45	123	99	87	228	363	1065
India	7766	79	2485	777	29869	1697	3877	2059	48607
Indonesia	1750	43	320	420	2500	1400	2580	4627	13640
Israel	1320	7	2680	1775	1300	1600	17	6267	14966
Japan	12684	414	9421	6447	7349	1296	1263	48099	86974
Malaysia	14116	34	8051	1232	1510	3501	1835	52305	82584
Mexico	34875	125	3950	2604	3150	3790	12696	5816	67006
Philippines	4100	85	840	388	830	655	173	9728	16799
Singapore	9925	110	6343	1474	3134	375	162	70320	91844
South Africa	300	1	122	73	180	188	156	99	1119
South Korea	10960	122	3150	2630	14160	904	1005	128833	161764
Taiwan	35483	9	623	3458	6075	1402	380	116330	163758
Thailand	13286	317	878	371	765	2946	1387	11971	31921
USA	32076	795	48390	35695	89610	7940	707	77245	292458
Vietnam	21299	158	1025	1052	34112	9600	4061	9461	80768
TOTAL	477228	5910	116762	74603	382982	90639	70075	770986	1989183

CONSOLIDATED SUMMARY OF MARKETS 2024

Table 2.18

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	8144	147	2933	1339	4936	1524	1716	2390	23128
Brazil	11407	139	5357	1280	5968	1594	2087	11855	39687
Canada	10497	181	3748	2520	4943	2675	2149	3828	30542
China	134373	727	35182	12681	42586	14487	12545	313260	565841
Hong Kong	3656	30	318	223	937	312	579	1197	7252
India	10140	122	7528	1835	16805	2287	4730	34308	77755
Indonesia	3814	122	2013	754	6692	1545	1219	4810	20969
Israel	3241	35	953	1185	1851	277	400	2660	10602
Japan	29454	625	4125	4303	23447	6079	4612	48467	121112
Malaysia	3055	45	1834	480	1915	353	562	26221	34465
Mexico	12504	166	4340	1782	7023	905	2067	43992	72779
Philippines	1957	26	1539	289	1272	553	340	4918	10894
Singapore	11769	111	3286	482	3377	670	899	14926	35519
South Africa	2593	107	662	302	1654	740	233	768	7058
South Korea	6704	85	7297	2733	5588	1754	1602	30029	55792
Taiwan	5887	41	5036	986	2734	524	553	21915	37676
Thailand	5248	61	2655	802	4319	930	1169	13410	28594
USA	140370	861	43913	36236	140655	25832	23138	126147	537152
Vietnam	2561	87	3265	662	4275	925	1085	55204	68064
TOTAL	407374	3717	135984	70874	280977	63966	61685	760305	1784881

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