

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

The top Two European-owned companies remained the same in 2024 the long-term Number One Zollner, with sales over Euro 2 billion and the Danish company GPV the only other company with sales over Euro 1 billion.

Acquisitions have again had an impact across the Top 50 ranking. On a pro-forma basis the Number 3 ranked Scanfil added Euro129 million in additional revenues gaining a significant presence in Southern Europe and extended its operations in the USA. HANZA moved to Number 4 with two additional acquisitions in the Nordic region and moved to number 2 in Germany through the purchase of the BMK Group acquisitions adding an additional Euro 436 million in revenues.

Cicor moved to 6th in the ranking following a series of acquisitions, the Swiss company entering the French and Spanish markets and extended its presence in Germany. The Synov Groupe acquired Prima Electro in Italy its first acquisition outside of France.

The German Keenfinity group, the former Bosch security and communication technology product business, has established an independent EMS business entering the Top 50 ranked 17th.

Including acquisitions the Top 50 European-owned companies generated revenues of Euro 13.7 billion from their EMEA manufacturing operations and accounted for 30.5% of the total EMEA market.

With extensive volume manufacturing operations in Europe the Top Three foreign-owned EMS providers in EMEA in 2024 - Foxconn, Flex and Jabil - had estimated revenues of Euro 16.1 billion while the current 14 foreign-owned companies in the Top 50 EMEA ranking accounted for 45.4% of the total.

For the leading European-owned companies and after taking into account acquisitions made between 2024 and the end of May 2026 8 had global revenues over 500 million, 15 between Euro 200 million and Euro 499 million and 15 between Euro 100 and Euro 199 million. In 2024, the lowest ranked company had revenues of Euro 68 million.

The Sixteenth 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 2024
- A ranking of the Top 50 European EMS providers in 2024 based on global revenues.
- A ranking of the Top 50 European-owned EMS providers in 2024 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 14 non-European including an outline of their operations and latest company developments.

The Top 25 European-Owned EMS Providers in 2024 based on Global Revenues

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

Note: Based on global revenues. Includes acquisitions announced in 2024 through to May 2026

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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AEMTec

Agôn Electronics

Alliance Electronics

Aurightec

BECOM

Bitron Electronics

Cicor

cms electronics

Cofidur

Connect Group

Darekon

DELTEC Group

Elemaster

Elrad

FAE Technology

Fideltronik

GPV

HANZA

HAPRO

Incap

Inission

KEENFINITY EMS

Kitron

Kontron

LACROIX Electronics

LEAB

Matra Electronique

Melecs

ml&s

MW.FEP

Neways

Norautron

NOTE

Prettl Electronics

RAFI

RAWE Electronic

Rimaster

Scanfil

Selcom Group

Selha

SERO

SYNOV

TLT Manufacturing

Tonfunk

TQ-Group

TT Electronics

Variosystems

VIDEOTON

Westcontrol

Zollner

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

AL Electronics

ALL CIRCUITS

AMS Electronics

Asteelflash/USI

Benchmark

Celestica

Flex

Foxconn

Integrated Micro-Electronics

Jabil

Kimball Electronics

Nistec

NPE

Plexus

RH Technologies

Sanmina

SIIX

SVI

USR Electronic Systems

5 Directory of Manufacturing Facilities

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Related Reports

[The European EMS Industry - A Strategic Market Analysis of the European Electronic Manufacturing Services Industry 2024-2029](#)

The Twenty Third edition of **The European EMS Industry - A Strategic Market Analysis of the EMEA Electronic Manufacturing Services Industry 2024-2029** 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 2029 for Western Europe, CEE and North Africa/Israel in a single report

- Breakdown of the West European and CEE/MENA market by major sector.

- Ranking and detailed profile of the Top 25 EMS providers in Europe

- An overview of the EMS industry by major country or region, highlighting the major players including a ranking of the Top companies in 2024.

- A directory by country of over 2,500 EMS manufacturing locations, contact numbers, websites etc.

- A ranking of the top 50 EMS in EMEA in 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 868620

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 868620



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.

Each month EEMF provides the latest:

- Market analysis and trends
- Key mergers & acquisitions
- Latest news and developments within the Automotive; Electrification & Battery Technology; EMS/PCB; Production; Aerospace & Defence; Semiconductors and Renewable Technology end markets
- Key Developments in the Asia Pacific
- Industry Outlook
- *EMS Quarterly Financial Update (Separate Excel File)*
- Ad-hoc original research articles providing in-depth overviews across key growth sectors of the European electronics and related industries.

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 or to receive a sample issue please contact andrew.fletcher@rer.co.uk

www.rer.co.uk

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