

# **The European Electronic Manufacturing Services Industry**

A Strategic Market Analysis of  
the European EMS Industry 2011-2016

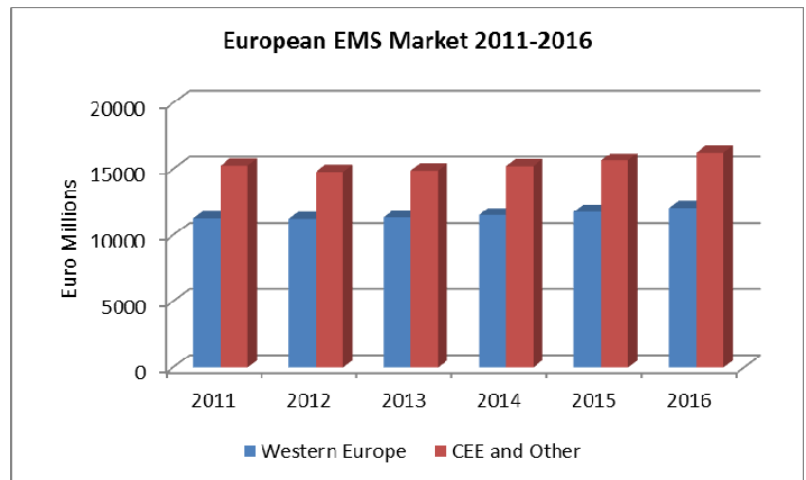
## New Report Provides Strategic Analysis on the European Electronic Manufacturing Services Market

With the outlook for the European and global economy remaining uncertain growth in the European Electronic Manufacturing Services (EMS) Industry will weaken further in the later part of 2012 and is now forecast to decline by around 2% for the year as a whole to Euro 26.0 billion, according to the latest findings from *Reed Electronics Research*. The current economic crisis and low growth will continue into 2013 and although significant downside risks remain based on the latest indicators a modest recovery should begin in the later part of the year which should gain traction in 2014. In-line with the general recovery in Europe, EMS revenues after stagnating in 2012 and 2013 are expected to show modest growth in 2014 and then show low single-digit growth in the period to 2016.

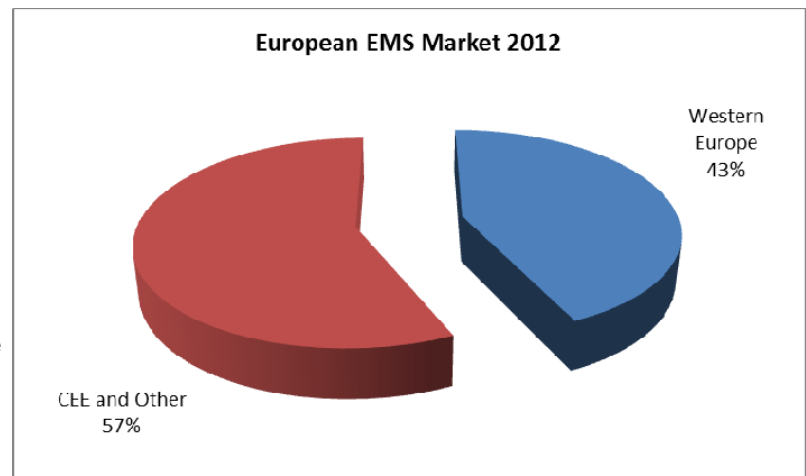
Growth in CEE and North Africa will outpace Western Europe and although the 3C segment – computing, communications and consumer – will continue to dominate, the region will increasingly benefit from the transfer of EMS revenues that is taking place in the Automotive, Medical, Control & Instrumentation, Industrial and Telecommunications (AMCIT) .

We expect to see the low volume/high mix sectors of AMCIT to grow in Western Europe by between 2.6% to 3.5% over the period to 2016. Competition in these sectors will be fierce, in particular, between the leading European-owned EMS providers but also the global Group 1 companies who look to exploit their existing European manufacturing and design capabilities.

Group 1 EMS companies, typically with global operations and sales turnovers in billions of Euro have continued to migrate the remaining production of 3C products to lower cost countries. There has been an increase in the number of Group 2 and Group 3 EMS companies operating lower cost manufacturing plants as they seek to provide greater value to their customers. All of these three groups have retained some manufacturing and the greater part of the design, development and sales teams in Western Europe to maintain relationships with the OEM's based in that area. In total we estimate that there are more than 950 companies across all groups of EMS company, with the majority Group 4 which in our definition are small privately-owned companies operating nationally and possibly in niche sectors. We expect to see further consolidation of the number of EMS companies in Europe over the period to 2016 with this taking place across all 4 Groups.



Forecasts based on constant revenues and exchange rates i.e. inflation is not included



The first edition of **The European EMS Industry - A Strategic Market Analysis of the European EMS Industry 2011-2016** highlights the issues impacting the European EMS market. This comprehensive report, which updates the market forecast published in RER's major bi-annual study on the European EMS Industry, provides:-

- An analysis and revenue forecasts for both West and East and Central Europe in a single report.
- A breakdown of the market by sector.
- An analysis of the key market trends impacting the European EMS industry.
- A ranking of the Top 20 European EMS Providers.
- a ranking of the leading EMS providers by country sub-region.
- Background data on European electronics production.

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## 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 Europe in detail and further listing of EMS companies by geographic location.

- EMS – The report provides a complete overview of the European EMS industry, including revenue forecasts by country, competitor information and the trends which will have an impact on business in the period from 2012 to 2016.

- 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 and now offer a range of publications as well as 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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## Related Research

### The European EMS Industry - A Strategic Study of the European EMS Industry 2011-2015

RER's bi-annual study on the European EMS Industry. In addition to an in-depth analysis of the market, the report provides in-depth profiles on the Top 20 European EMS providers; country and regional profiles including key trends, the role of the Global Group 1 companies and profiles of the major EMS companies by country and sub-region; and a directory of over 1,000 plus manufacturing locations.

*Publication Date: September 2011*

*Price: £1500/Euro 1875/Report & CD: £1645/Euro 2055*

*Price if purchased with the current report £750/Euro 935*

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

Annual report providing a strategic analysis of the Top 50 European EMS providers. The report provides a ranking by revenue for 2011, detailed company profiles and a directory of their European manufacturing facilities.

*Publication Date: November 2012*

*Price: £550/Euro 685*

*For a limited period the price includes an annual subscription to European Electronic Markets Forecast (see below)*

### European Electronic Markets Forecast (EEMF)

Published since 1996, EEMF provides a combination of market analysis, industry overviews and company news to keep you fully informed of the latest developments in the European and global electronics industry. Designed to save you time and resources the report can quickly be distributed via email to the key decision makers within your company.

*Publication Date: Monthly*

*Price: £450/Euro 565*

*Introductory price £360/Euro 450*

*For a sample copy please contact [andrew.fletcher@rer.co.uk](mailto:andrew.fletcher@rer.co.uk)*

### The European Electronics Industry - European Electronics Production 2000-2015

As part of its programme 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 2000-2015 the research allows you to track developments both geographically and by major product group for 29 countries.

*Publication Date: September 2012*

*Price: £995/Euro 1245.*

**Please visit [www.rer.co.uk](http://www.rer.co.uk) for detailed information or contact [anita.caird@rer.co.uk](mailto:anita.caird@rer.co.uk)**

## THE EUROPEAN EMS INDUSTRY 2011-2016

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