Global and China EMS and ODM Industry

Report, 2013-2014

Mar. 2014

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.

◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.

◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.

◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.

◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Global and China EMS and ODM Industry Report 2013-2014 studies the following aspects:
1, Overview of EMS (Electronic Manufacturing Services) industry
2, EMS and ODM downstream market
3, EMS and ODM industry
4, 26 EMS and ODM companies

EMS and ODM services refer to the services for brand vendors except brand marketing, including product development and design, raw material procurement, manufacturing, assembly and after-sales services. There comes EMS and ODM according to the scope of service, but the boundary between EMS and ODM is difficult to determine. Many ODM companies are engaged in EMS business, and EMS companies are also involved in design, so the EMS and ODM industry arises.

Thanks to high capacity utilization, EMS and ODM vendors are adept at controlling costs, which can speed up the shipment. Electronic products have a short lifespan, so the shipment must be done fast. The huge capacity and sound global logistics enable EMS and ODM vendors to launch products quickly. Besides, they can improve the efficiency of inventory management and procurement to take up less floating capital and space, reduce procurement costs, cut down capital expenditures and abate financial costs.

Global Top 20 EMS and ODM Vendors by Ranking, 2012-2013

Ranking of Global Top 20 EMS Companies by Revenue, 2012-2013
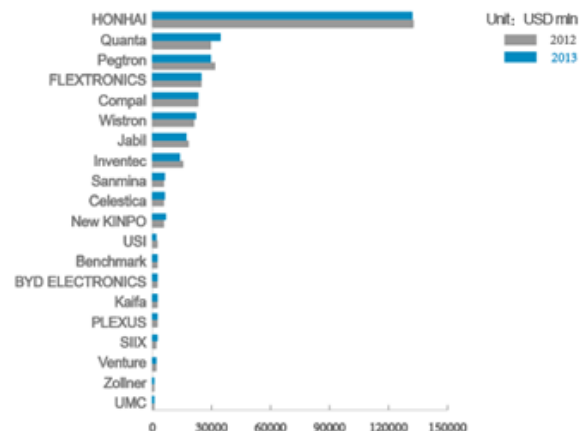
In 2013, global EMS market size approximated USD
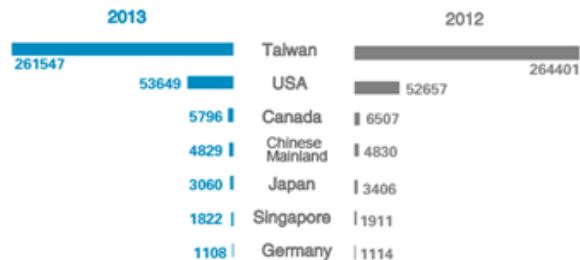
363.8

billion

Global EMS market is expected to climb up slightly, being USD

367.6

billion

Geographical Distribution of Global Top 20 EMS Companies, 2012-2013

	2013		2012
Taiwan	261547		264401
USA	53649		52657
Canada	5796		6507
Chinese Mainland	4829		4830
Japan	3060		3406
Singapore	1822		1911
Germany	1108		1114

Based on headquarter's location, Unit: USD mln

About

75%

global EMS industry is done by Taiwanese companies

Source: Global and China EMS and ODM Industry Report, 2013-2014,ResearchInChina

The EMS and ODM market valued about USD363.8 billion in 2013, representing a slight decrease of 0.3% over 2012, mainly due to a significant decline in the laptop shipment which is expected to drop further amid the sluggish global economic recovery in 2014. The global EMS and ODM market will fall by 2% in 2014 and rebound 1.5% to USD367.6 billion in 2015.

The EMS and ODM market covers telecommunications and network equipment, communications terminals (mobile phone), computers (including desktop PC, laptop, Tablet PC), computer peripherals (including HDD, display, printer, etc.), consumer electronics (TV sets, game consoles) , industrial electronics, automotive electronics, medical and defense electronics.

In the upcoming five years, the mobile phone market will embody the hugest growth potentials in the EMS and ODM industry. The success of Xiaomi that focuses on marketing hype and brand promotion while entirely outsources manufacturing to its contract vendors propels EMS and ODM services. Xiaomi's remarkable achievement stimulates a large number of mobile phone companies to follow suit, which opens a wide space for EMS and ODM vendors. Samsung and LG may commission EMS and ODM vendors to conduct manufacturing partly. The EMS and ODM market size of communication terminals is expected to jump from USD30.8 billion in 2013 to USD35.2 billion in 2017.

In the global EMS and ODM industry, there are about 300-350 companies with high industrial concentration. Top eight enterprises occupy about 81% market share and seize large customers. Accordingly, medium-sized enterprises are hard to see growth.

By corporate headquarters, Taiwan acts as the core of the global electronics industry. In the world, about 75% of EMS and ODM vendors are Taiwanese companies represented by Hon Hai, Quanta, Pegatron, Compal, Wistron, Inventec, New Kinpo and Universal Scientific Industrial (ASE) successively by revenue ranking.
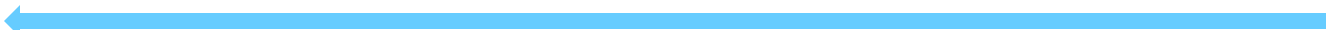
- Process of EMS and ODM
- EMS and ODM Market Size, 2011-2017E
- Downstream Distribution of EMS and ODM Market, 2013 vs 2017E
- Desktop PC Shipment, 2008-2015E
- Global Device Shipment by Operating System
- Top 5 PC Vendors and Global PC Shipment, Q4 2013
- Top 5 PC Vendors and Global PC Shipment, 2013
- Laptop Shipment, 2008-2015E
- Shipment of Major Global Laptop ODM Vendors, 2010-2013
- Global Tablet PC Shipment, 2010-2016E
- Market Share of Major Tablet PC Brands, 2013
- Output of Global Tablet PC Vendors, 2012-2013
- Revenue Growth Rate of Top Global 5 Telecom Vendors, 2007-Q3 2013
- Profit Growth Rate of Top Global 5 Telecom Vendors, 2007-Q3 2013
- Quarterly Capital Expenditure Growth Rate of 33 Global Operators, Q1 2011-Q3 2013
- Capital Expenditure of Three Major Chinese Operators, 2010-2015E
- Global Mobile Communications Infrastructure Equipment Market Size, 2006-2016E
- Global LTE Equipment Market Size, 2009-2016E
- Global LTE Basestation Shipment and Investment Scale, 2009-2017E
- Market Share of Major Global Mobile Communications Infrastructure Equipment Vendors, 2013
- Market Share of Major Global 4G Mobile Communications Infrastructure Equipment Vendors, 2013
- RRH Shipment, 2012-2017E
- RRH Market Size, 2012-2017E
- Market Share of Major RRH Vendors, 2013
- RRH Shipment by Power, 2013

- Market Share of China Mobile 4G Basestation Bidding Vendors
- Market Share of China Telecom 4G Basestation Bidding Vendors
- Data Center Market Size, 2011-2017E
- DC (DataCenter) System Expenditure Growth Rate, 2011-2017E
- Global Switching Market by Speed, 2010-2015E
- Global Switching Shipment by Speed, 2010-2015E
- Market Share of Major Edge and Core Router Vendors, 2005-2012
- Market Share of Global DSL Vendors, 2013
- Top 5 DSL/VDSL Vendors by Region
- Global Mobile Phone Shipment, Q1 2011-Q4 2013
- Global Mobile Phone Shipment, 2007-2014
- Worldwide Smartphone Sales to End Users by Vendor, 2013
- Worldwide Smartphone Sales to End Users by Operating System, 2013
- Worldwide Mobile Phone Sales to End Users by Vendor, 2013
- Smartphone Operating System Shipment and Market Share, Q2 2013
- Shipment and Market Share of Major Android Mobile Phone Vendors, Q2 2013
- Shipment and Market Share of Major Windows Smartphone Vendors, Q2 2013
- Smartphone Shipment of Major Chinese Vendors, 2011-2013
- Market Share of Major Chinese Mobile Phone Vendors, 2013
- Mobile Phone Output by Region, Jan-Nov 2013
- Global EMS and ODM Output Value by Region, 2013
- Ranking of Global Top 20 EMS and ODM Vendors by Revenue, 2012-2013
- Gross Margin of Global Top 18 EMS and ODM Vendors, 2012-2013
- Hon Hai's Revenue and Gross Margin, 2007-2014
- Hon Hai's Monthly Revenue, Jan 2012-Jan 2014

- Hon Hai's Revenue by Client, 2013
- Financial Data of Hon Hai's Key Subsidiaries in Mainland China, 2012
- Revenue and Gross Margin of BYD Electronic, 2008-2014
- Revenue of BYD Electronic by Business, 2006-2013
- Revenue of BYD Electronic's Component & Module Division by Product, 2013
- Revenue of BYD Electronic by Client, 2013
- Revenue and Gross Profit of Flextronics, FY2009-FY2014
- Balance Sheet of Flextronics, FY2009-FY2013
- Quarterly Revenue and Gross Margin of Flextronics, Q2 2012-Q4 2013
- Revenue of Flextronics by Region, FY2011-FY2014
- Property and Equipment of Flextronics by Region, FY2012-FY2014
- Revenue of Flextronics by Business, FY2011-FY2014
- Jabil's Revenue and Operating Margin, FY2009-FY2014
- Jabil's Quarterly Revenue and Gross Margin, Q1 FY2012-Q4 FY2013
- Jabil's Revenue by Business, 2011-2013
- Jabil's Revenue by Region, FY2011-FY2013
- Jabil's Long-lived Assets by Region, FY2012-FY2013
- Quanta's Revenue and Gross Margin, 2005-2013
- Quanta's Monthly Revenue and Growth Rate, Dec 2011-Dec 2013
- Quanta's Laptop Shipment and Growth Rate, 2004-2011
- Quanta's Revenue by Product, 2013-2014
- Quanta's Organization
- Compal's Revenue and Gross Margin, 2005-2013
- Compal's Revenue and YoY Growth Rate, Dec 2011-Dec 2013
- Compal's Laptop Shipment and Growth Rate, 2007-2011

- Compal's Global Presence
- Compal's Structure
- Output of Compal China, 2009-2011
- Wistron's Revenue and Gross Margin, 2003-2013
- Wistron's Monthly Revenue, Dec 2011- Dec 2013
- Wistron's Laptop Shipment and Growth Rate, 2004-2013
- Wistron's Revenue by Product, 2013
- Financial Data of Wistron's Key Subsidiaries, 2012
- Inventec's Structure
- Inventec's Revenue and Monthly Growth Rate, Dec 2011- Dec 2013
- Inventec's Laptop Shipment, 2005-2013
- Financial Data of Inventec's Key Subsidiaries, 2012
- Pegatron's Structure
- Pegatron's Revenue and Gross Margin, 2008-2013
- Pegatron's Monthly Revenue, Dec 2011- Dec 2013
- Pegatron's Revenue by Product, 2013
- Financial Data of Pegatron's Key Subsidiaries, 2012
- Celestica's Revenue and Gross Margin, 2008-2013
- Celestica's Revenue by Application, Q1 2012-Q4 2013
- Celestica's Revenue by Application, 2010-2013
- Celestica's Revenue by Region, 2010-2012
- Kinpo's Organizational Structure
- Cal-Comp's Revenue and Gross Margin, 2007-2013
- Cal-Comp's Revenue by Product, 2013
- Cal-Comp's Structure

- Benchmark's Revenue and Gross Margin, 2008-2013
- Benchmark's Revenue by Application, 2010-2013
- Sanmina's Revenue and Operating Margin, FY2009-FY2014
- Sanmina's Revenue and Gross Margin, Q4 FY2012-Q1 FY2014
- Sanmina's Revenue by Application, FY2011-FY2013
- Sanmina's Revenue by Region, 2011-2013
- Sanmina's Production Bases
- Revenue and Gross Margin of Universal Scientific Industrial, 2008-2013
- Quarterly Revenue and Gross Margin of Universal Scientific Industrial, Q1 2012-Q4 2013
- Quarterly Revenue of Universal Scientific Industrial by Product, Q1 2012-Q4 2013
- Revenue and Operating Margin of Universal Scientific Industrial (Shanghai), 2008-2013
- Revenue of Universal Scientific Industrial (Shanghai) by Application, 2011-2013
- Output of Universal Scientific Industrial (Shanghai) by Product, 2011-2012
- Cost Structure of Universal Scientific Industrial (Shanghai), 2012
- SIIX's Revenue and Gross Margin, 2008-2013
- SIIX's Organizational Structure
- SIIX's Revenue by Application, 2012
- SIIX's Revenue by Application, Sep 2013
- SIIX's Revenue by Region, 2012-Sep 2013
- Revenue and Gross Margin of Plexus, FY2009-FY2013
- Revenue of Plexus by Application, FY2011-FY2013
- Revenue of Plexus by Region, FY2011-FY2013
- Revenue and Gross Margin of Shenzhen Kaifa Technology Co., Ltd., 2007-2013
- Venture's Revenue and Gross Margin, 2008-2013
- Venture's Revenue by Business, 2011-2013

- Zollner's Major Clients
- Major Products of SUMITRONICS
- Global Presence of SUMITRONICS
- GBM's Organizational Structure
- GBM's Revenue and Gross Margin, 2007-2013
- GBM's Monthly Revenue, Jan 2012-Jan 2014
- VTech's Revenue and Pre-tax Profit Margin, FY2009-FY2014
- Vtech's Revenue by Business, 2010-2013
- Vtech's CMS Revenue by Product, 2012-2013
- Revenue of Vtech's CMS Division by Region, FY2014
- Major Products of CMS Division
- CMS Manufacturing Capacity
- CMS Capacity Expansion, 2011-2014
- Major Products of 3CEMS
- PCB Capacity of 3CEMS
- Plants of 3CEMS
- Revenue and Gross Margin of Shenzhen Zowee Technology, 2009-2014
- Revenue of Shenzhen Zowee Technology by Product, FY2009-FY2013
- Revenue and Gross Margin of PC Partner Group, FY2009-FY2013
- Revenue of PC Partner Group by Product, FY2009-FY2013
- Revenue of PC Partner Group by Region, FY2009-FY2013

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