Global and China EMS/ODM Industry Report, 2014-2015

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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.

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Abstract

Global and China EMS/ODM Industry Report, 2014-2015 is primarily concerned with the following:
1, Overview of EMS/ODM industry;
2, EMS/ODM market and industry;
3, Ranking in the EMS/ODM industry;
4, 27 typical EMS/ODM manufacturers.

In 2014, thanks to a surge in shipments of mobile phone vendors such as Apple, Huawei, and Xiaomi, the EMS/ODM market rose by 5%, in contrast to a 0.5% drop in 2013. In 2014, the growth in mobile phone offset the drop in notebook computer market. In 2015, Apple mobile phone will still have strong growth potential, but with the growth rate dwarfed by that in 2014. The 4G construction of Radio Access Networks reached the peak in 2014. It is projected that the RAN market will be on the decline in 2015-2019. Moreover, the data size of mobile Internet surged, data center or cloud computing services market grew robustly. Consequently, the EMS/ODM market in 2015 increased by 3.1%. In future, smartphones will be saturated and RAN market will decline, which would prompt the growth rate of EMS/ODM to drop year by year.

Ranking of TOP 20 Global EMS Enterprises by Revenue, 2012-2014
(USD mln)

	2012	2013	2014
HONHAI	131,837	132,551	138,690
Quanta	34,605	29,501	30,491
Pegtron	29,750	31,864	33,559
FLEXTRONICS	24,644	24,679	26,471
Compal	23,386	22,927	27,850
Wistron	22,208	20,925	19,493
Jabil	17,152	16,630	16,701
Inventec	13,872	15,458	14,346
Sanmina	6,086	5,869	6,441
Celestica	6,507	5,796	5,631
New KINPO	6,634	5,688	6,280
USI	2,109	2,633	3,501
Benchmark	2,468	2,506	2,797
BYD ELECTRONICS	2,232	2,594	3,228
Kaifa	2,598	2,186	2,596
PLEXUS	2,307	2,258	2,378
SIIX	2,378	2,080	1,979
Venture	1,911	1,822	2,024
Zollner	1,114	1,108	1,210
UMC	1,082	980	950

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IT infrastructure, with data center or cloud computing services as the core, will constitute the biggest driving force. The server shipments will grow robustly in 2015, with an overall shipment estimated to increase by 13.5%. In particular, the ODM-Direct will rise by 20%. Server OEM and ODM-Direct are basically monopolized by the Taiwanese vendors, with a global market share of over 90%. Taiwan has a complete industrial chain of server, which is viewed as an extension of the computer. As the Taiwanese vendors have stronger and stronger technical ability, the future equipment cabinet solution of Server+Routing+Storge+Switching will gain more market space.

However, the European and US EMS/ODM vendors are dedicated to improving profitability by reducing the revenue proportion of telecom and communication infrastructure, and intensifying the expansion to industrial, medical, and automotive sectors. Meanwhile, they have also strengthened the weakness in components, and ventured into the upstream sector of industrial chains. But compared with the Taiwanese vendors, the European and US EMS/ODM peers lagged far behind in the field of components. They would make up for the shortcomings through M&A, with, for example, Jabil's acquisition of Nypro.

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