

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

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Abstracts

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.

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+Storage+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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