

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

<https://marketpublishers.com/r/G6FE45EA113EN.html>

Date: April 2015

Pages: 128

Price: US\$ 2,300.00 (Single User License)

ID: G6FE45EA113EN

## 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.

## Contents

### **1 INTRODUCTION TO EMS AND ODM**

- 1.1 Definition
- 1.2 Background

### **2 EMS AND ODM DOWNSTREAM MARKET**

- 2.1 EMS and ODM Market Size
- 2.2 Wireless Access Network Equipment
- 2.3 Cloud Service Market
  - 2.3.1 Cloud Service Overview
  - 2.3.2 Cloud Service Market Size
  - 2.3.3 Datacenter Workload
- 2.4 Memory
  - 2.4.1 Memory Market Size
  - 2.4.2 Memory Industry
- 2.5 Data Center
- 2.6 Server
  - 2.6.1 Server Market Size
  - 2.6.2 Server Industry
- 2.7 Global Mobile Phone Market and Industry
- 2.8 China Mobile Phone Market
- 2.9 Laptop Computer Market
- 2.10 Tablet PC Market
- 2.11 HDD Market
- 2.12 HDD Industry

### **3 EMS AND ODM INDUSTRY**

- 3.1 Overview
- 3.2 Ranking
- 3.3 SMEs

### **4 EMS AND ODM VENDORS**

- 4.1 Hon Hai
- 4.2 BYD Electronic

- 4.3 Flextronics
- 4.4 Jabil
- 4.5 Quanta Computer
- 4.6 Compal
- 4.7 Wistron
- 4.8 Inventec
- 4.9 Pegatron
- 4.10 Celestica
- 4.11 Cal-Comp
- 4.12 Benchmark
- 4.13 Sanmina
- 4.14 Universal Scientific Industrial (USI)
  - 4.14.1 USI Shanghai
- 4.15 SIIX
- 4.16 Plexus
- 4.17 Shenzhen Kaifa Technology Co., Ltd.
- 4.18 Venture
- 4.19 Zollner
- 4.20 UMC
- 4.21 SUMITRONICS
- 4.22 GBM
- 4.23 VTech
- 4.24 3CEMS
- 4.25 Shenzhen Zowee Technology
- 4.26 PC Partner Group
- 4.27 FIH Mobile Limited

## Selected Charts

### SELECTED CHARTS

Downstream Distribution of EMS and ODM Market, 2013 vs 2017E  
Market Share of Major Global Mobile Communication Equipment Companies, 2013  
Market Share of Major Global 4G Mobile Communication Equipment Companies, 2013  
Market Share of Major Global Mobile Communication Equipment Companies, 2014  
Essential Characteristics of Cloud  
Cloud Deployment Models  
Cloud Service Models—IaaS, PaaS, and SaaS  
Global Public Cloud Market Size, 2008-2020E  
Cloud Computing Infrastructure and Platform Market Size, 2013-2018E  
Cloud Platform TAM and Pool of the Enterprise Spend, 2013-2018E  
Global Workload Distribution, 2013–2018E  
Public vs. Private Cloud Growth, 2013-2018E  
SaaS Most Highly Deployed Global Cloud Service by 2018E  
SaaS Gains Momentum in Private Cloud, 2013-2018E  
IaaS and PaaS Gain Public Cloud Share of Workloads, 2013-2018E  
Memory Market Size, 2009-2017E  
Personal Cloud Storage—Growth in Users, 2013-2018E  
Consumer Cloud Storage Traffic Growth, 2013-2018E  
Worldwide ECB Disk Storage Vendor Revenue, 2014  
Worldwide ECB Disk Storage Vendor Revenue, 2012-2013  
Worldwide ECB Disk Storage Vendor Revenue, 2013  
Regional Distribution of Total Data Center Workloads, 2013-2018E  
Regional Distribution of Cloud Workloads, 2013-2018E  
Regional Distribution of Traditional Data Center Workloads, 2013-2018E  
Global Server Market Size, 2013-2018E  
Top 5 Corporate Family, Worldwide Server Systems Factory Revenue, 2013  
Top 5 Corporate Family, Worldwide Server Systems Factory Revenue, 2014Q4  
Worldwide Server Vendor Shipments, 2014Q4  
Worldwide Server Vendor Revenue, 2014Q4  
EMEA Server Vendor Revenue, 2014Q4  
EMEA Server Shipment, 2014Q4  
Market Share of Global Server Brand Vendors, 2015  
Market Share of Global Server Manufacturers, 2015  
Supply Relationship between OEM and Server Brand Vendors  
Global 3G/4G Mobile Phone Shipment by Region, 2011-2014

Worldwide Smartphone Sales to End Users by Vendor, 2014  
Worldwide Smartphone Sales to End Users by Operating System, 2014  
Shipments of Global Top10 Mobile Phone Vendors, 2014  
Monthly Shipment of Mobile Phone in China, Jan.2013-Dec.2014  
Market Share of Major Vendors in Chinese Smart Phone Market, 2014  
Market Share of Major Vendors in Chinese 4G Mobile Phone Market, 2014  
Laptop Computer Shipments, 2008-2015E  
Shipments of Global Major Laptop Computer ODM Companies, 2010-2014  
Global Tablet PC Shipments, 2011-2016E  
Shipments of Top5 Tablet PC Vendors, 2014 Q4  
Shipments, Market Share, and Growth of Top5 Tablet PC Vendors, 2014  
Quarterly HDD Shipment, 2012Q4-2014Q4  
HDD Shipment, 2009-2015  
Market Share of Global Major HDD Vendors, 2014  
HDD Shipment by Application, 2010-2019E  
Global EMS and ODM Output Value by Region, 2013  
Ranking of Global Top 20 EMS and ODM Vendors by Revenue, 2012-2014  
Gross Margin of Global Top 18 EMS and ODM Vendors, 2012-2014  
Hon Hai's Revenue and Gross Margin, 2007-2015  
Hon Hai's Monthly Revenue, Mar.2013-Mar.2015  
Hon Hai's Revenue by Client, 2013  
Revenue and Gross Margin of BYD Electronic, 2008-2014  
Revenue of BYD Electronic by Business, 2006-2014  
Revenue of BYD Electronic's Component & Module Division by Product, 2013  
Revenue of BYD Electronic by Client, 2013  
Revenue of BYD Electronic by Client, 2014  
Revenue and Gross Profit of Flextronics, FY2009-FY2015  
Balance Sheet of Flextronics, FY2009-FY2014  
Quarterly Revenue and Gross Margin of Flextronics, Q1 2013-Q4 2014  
Revenue of Flextronics by Region, FY2011-FY2014  
Property and Equipment of Flextronics by Region, FY2012-FY2014  
Revenue of Flextronics by Business, FY2011-FY2014  
Top 10 Clients of Flextronics  
Revenue from INS Segment of Flextronics, FY2010-FY2014  
Revenue from IEI Segment of Flextronics, FY2010-FY2014  
Revenue from HRS Segment of Flextronics, FY2010-FY2014  
Revenue from CTG Segment of Flextronics, FY2010-FY2014  
Global Manufacturing Footprint of Flextronics  
Employee of Flextronics by Region, 2015

Jabil's Revenue and Operating Margin, FY2009-FY2015  
Balance Sheet of Jabil, FY2009-FY2014  
Jabil's Quarterly Revenue and Gross Margin, Q1 FY2013-Q2 FY2015  
Jabil's Revenue by Business, FY2011-FY2014  
Jabil's Revenue by Region, FY2012-FY2014  
Jabil's Long-lived Assets by Region, FY2013-FY2014  
Global Presence of Jabil  
Investment Fields of Jabil, 2015  
Quanta's Revenue and Gross Margin, 2005-2014  
Quanta's Monthly Revenue, and Growth Rate Mar.2013-Mar.2015  
Quanta's Laptop Computer Shipment and Growth Rate, 2004-2014  
Quanta's Revenue by Product, 2013-2014  
Quanta Computer Group Organization  
Compal's Revenue and Gross Margin, 2005-2015  
Compal's Monthly Revenue and YoY Growth Rate, Mar.2013-Mar.2015  
Compal's Laptop Computer Shipment and Growth Rate, 2007-2014  
Revenue of Compal by Product, 2014  
Compal's Global Presence  
Compal's Structure  
Wistron's Revenue and Gross Margin, 2003-2015  
Wistron's Monthly Revenue, Mar.2013-Mar.2015  
Wistron's Laptop Shipment and Growth Rate, 2004-2014  
Wistron's Revenue by Product, 2015  
Inventec's Structure  
Revenue and Gross Margin of Inventec, 2005-2015  
Inventec's Monthly Revenue, Mar.2013-Mar.2015  
Pegatron's Structure  
Pegatron's Revenue and Gross Margin, 2008-2015  
Pegatron's Monthly Revenue, Dec 2011- Dec 2013  
Pegatron's Revenue by Product, 2013  
Quarterly Revenue of Pegatron by Downstream Application, 2013Q1-2014Q4  
Celestica's Revenue and Gross Margin, 2008-2014  
Celestica's Revenue by Application, 2010- 2014  
Celestica's Revenue by Region, 2010-2014  
Kinpo's Organizational Structure  
Cal-Comp's Revenue and Gross Margin, 2007-2015  
Cal-Comp's Monthly Revenue, Mar.2013-Mar.2015  
Cal-Comp's Revenue by Product, 2013  
Benchmark's Revenue and Gross Margin, 2008-2014



Benchmark's Revenue by Application, 2010-2014  
Sanmina's Revenue and Operating Margin, FY2009-FY2015  
Sanmina's Revenue and Gross Margin, Q4 FY2012-Q1 FY2015  
Sanmina's Revenue by Application, FY2011-FY2013  
Sanmina's Revenue by Business, Q1 FY2014-Q1 FY2015  
Sanmina's Revenue by Region, FY2011-FY2014  
Sanmina's Balance Sheet Metrics, Q1 FY2014-Q1 FY2015  
Sanmina's Production Bases  
Revenue and Gross Margin of Universal Scientific Industrial, 2008-2014  
Quarterly Revenue and Gross Margin of Universal Scientific Industrial, Q1 2013-Q4 2014  
Quarterly Revenue of Universal Scientific Industrial by Product, Q1 2013-Q4 2014  
Revenue and Operating Margin of Universal Scientific Industrial (Shanghai), 2008-2014  
Revenue of Universal Scientific Industrial (Shanghai) by Application, 2011-2014  
Output of Universal Scientific Industrial (Shanghai) by Product, 2011-2014  
Cost Structure of Universal Scientific Industrial (Shanghai), 2014  
SIIX's Revenue and Gross Margin, 2008-2014  
SIIX's Capital structure, 2010-2014  
SIIX's Cash Flow, 2010-2014  
SIIX Organizational Structure  
SIIX's Commercial Pattern  
SIIX's Revenue by Application, 2014-2015  
SIIX's Sales bridge, 2014-2015  
SIIX's Sales Structure by Region, 2014  
SIIX Distribution  
SIIX's Expansion in Mexico  
Revenue and Gross Margin of Plexus, FY2009-FY2014  
Revenue of Plexus by Application, FY2011-FY2014  
Revenue of Plexus by Region, FY2011-FY2014  
Revenue and Gross Margin of Shenzhen Kaifa Technology Co., Ltd., 2007-2014  
Revenue of Shenzhen Kaifa Technology Co., Ltd. by Business, 2012-2014  
Venture's Revenue and Gross Margin, 2008-2014  
Venture's Revenue by Segment, 2013-2014  
Venture's Revenue by Business, 2011-2014  
Zollner's Major Clients  
Major Products of SUMITRONICS  
Global Presence of SUMITRONICS  
GBM's Organizational Structure  
GBM's Revenue and Gross Margin, 2007-2015



GBM's Monthly Revenue, Mar.2012-Mar.2015  
VTech's Revenue and Pre-tax Profit Margin, FY2009-FY2015  
Major Products and Services of Vtech  
Vtech's Revenue by Business, FY2010-FY2015  
Revenue of Vtech's ELP Business by Region, FY2014  
Revenue of Vtech's Phone Business by Region, FY2014  
Revenue of Vtech's CMS Business by Product, FY2012-FY2013  
Revenue of Vtech's CMS Business by Region, FY2014  
Major Products of Vtech's CMS Division  
CMS Manufacturing Capacity of Vtech  
Vtech's CMS Manufacturing Capacity Expansion, FY2011-FY2014  
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-FY2014  
Revenue and Gross Margin of PC Partner Group, FY2009-FY2014  
Revenue of PC Partner Group by Product, FY2009-FY2014  
Revenue of PC Partner Group by Region, FY2009-FY2014  
Revenue and Operating Margin of FIH, 2006-2015  
Revenue Structure of FIH by Client, 2014  
Revenue Structure of FIH by Region, 2005-2014

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