

# **EMS and ODM Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Electronics Manufacturing Services (EMS), Original Design Manufacturer (ODM)), By Application (Electronics, Servers and Storage, Networking, Others), By Region and By Competition, 2019-2029F**

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## **Abstracts**

Global EMS and ODM Market was valued at USD 538.9 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.42% through 2029. The EMS (Electronic Manufacturing Services) and ODM (Original Design Manufacturer) market constitute integral components of the global electronics industry. EMS providers offer a comprehensive range of manufacturing services, including product design, assembly, testing, and logistics, to electronics companies lacking in-house manufacturing capabilities. They cater to a diverse clientele spanning various sectors, such as consumer electronics, automotive, healthcare, and telecommunications. EMS companies specialize in scaling production volumes efficiently, thereby enabling their clients to meet market demands swiftly and cost-effectively.

Key Market Drivers:

Increasing Demand for Consumer Electronics

The global EMS (Electronics Manufacturing Services) and ODM (Original Design Manufacturer) market is significantly driven by the ever-growing demand for consumer electronics. This category includes products such as smartphones, laptops, tablets, smartwatches, and other wearable devices. With the rapid advancement in technology

and the continuous introduction of innovative products, the consumer electronics market is expanding at an unprecedented rate.

One of the key factors contributing to this demand is the increasing adoption of smartphones globally. As smartphones become more affordable and accessible, their penetration in emerging markets is rising, further boosting demand. Additionally, the trend of digitalization and the need for staying connected have made smartphones indispensable in everyday life. This surge in demand necessitates efficient and large-scale manufacturing capabilities, which EMS and ODM providers are well-positioned to offer.

The shift towards smart homes and the Internet of Things (IoT) is driving the demand for interconnected devices. Smart home devices like smart speakers, security systems, and appliances are becoming mainstream, requiring sophisticated manufacturing solutions. EMS and ODM companies provide the necessary expertise and infrastructure to meet the production requirements of these advanced electronics.

The pace of technological advancements also means shorter product life cycles, compelling manufacturers to frequently update their product lines. This need for rapid innovation and faster time-to-market cycles is effectively addressed by EMS and ODM providers through their flexible and scalable manufacturing services. They enable consumer electronics companies to keep up with market demands and trends without the burden of managing large-scale production operations in-house.

The rise of e-commerce has made consumer electronics more accessible to a broader audience, accelerating market growth. Online platforms provide consumers with a wide range of options, often at competitive prices, which increases the volume of electronics being purchased and, consequently, the demand for manufacturing services.

### Advancements in Technology and Innovation

Technological advancements and continuous innovation are central drivers of the global EMS and ODM market. As technology evolves, the complexity and sophistication of electronic products increase, creating a need for specialized manufacturing capabilities that EMS and ODM providers excel in offering.

One of the primary technological advancements impacting the EMS and ODM market is the development of 5G technology. The rollout of 5G networks worldwide is revolutionizing telecommunications, enabling faster data transfer speeds and lower

latency. This advancement requires the production of new, compatible devices, including smartphones, routers, and IoT devices, which significantly boosts the demand for advanced manufacturing services.

Artificial intelligence (AI) and machine learning (ML) are also transforming the electronics industry. These technologies are being integrated into a variety of products, from smart home devices to autonomous vehicles, requiring sophisticated components and precise manufacturing techniques. EMS and ODM companies are at the forefront of incorporating AI and ML into their production processes, enhancing efficiency, and ensuring high-quality output.

The miniaturization of electronic components is a critical trend driven by technological advancements. As devices become smaller and more powerful, the demand for compact and efficient components grows. EMS and ODM providers have the expertise to manufacture these intricate components, ensuring optimal performance and reliability.

The rise of renewable energy technologies is another significant driver. With the global shift towards sustainable energy solutions, there is an increasing demand for solar panels, wind turbines, and energy storage systems. These technologies require advanced manufacturing capabilities to ensure they are efficient, durable, and cost-effective. EMS and ODM companies are well-equipped to meet these requirements, contributing to the growth of the renewable energy sector.

Advancements in medical technology are expanding the EMS and ODM market. Medical devices are becoming more sophisticated, incorporating advanced electronics for improved diagnostics, monitoring, and treatment. The production of these devices requires specialized knowledge and stringent quality control measures, areas where EMS and ODM providers excel.

Advancements in technology and innovation are pivotal drivers of the global EMS and ODM market. The development of 5G, the integration of AI and ML, the miniaturization of components, the growth of renewable energy technologies, and advancements in medical devices all contribute to the increasing demand for specialized manufacturing services. EMS and ODM companies play a crucial role in supporting these technological advancements, providing the necessary expertise and infrastructure to produce complex and innovative electronic products..

## Key Market Challenges

## Supply Chain Disruptions and Management

One of the most significant challenges facing the global Electronics Manufacturing Services (EMS) and Original Design Manufacturing (ODM) market is supply chain disruptions. These disruptions can arise from various factors, including natural disasters, geopolitical tensions, trade wars, and pandemics like COVID-19. The EMS and ODM market relies heavily on a complex and interconnected supply chain that spans multiple countries and regions. Any interruption in this chain can lead to delays, increased costs, and a halt in production.

The COVID-19 pandemic highlighted the fragility of global supply chains. Lockdowns and restrictions in various countries led to factory shutdowns, reduced workforce availability, and transportation bottlenecks. These disruptions not only affected the supply of raw materials and components but also the delivery of finished products. Companies had to navigate these challenges by finding alternative suppliers, adjusting production schedules, and managing customer expectations.

Geopolitical tensions and trade wars, such as those between the United States and China, have introduced additional complexities. Tariffs and export controls can restrict the flow of critical components, forcing companies to rethink their supply chain strategies. Diversifying supply sources and increasing local sourcing are potential solutions, but they come with their own set of challenges, such as increased costs and longer lead times.

## Technological Advancements and Rapid Innovation Cycles

The EMS and ODM market is characterized by rapid technological advancements and innovation cycles. Staying ahead in this fast-paced environment is a major challenge for companies. Technological evolution demands continuous investment in research and development (R&D), upgrading manufacturing capabilities, and acquiring new skills.

One significant area of technological advancement is the shift towards smart manufacturing and Industry 4.0. Incorporating advanced technologies like the Internet of Things (IoT), artificial intelligence (AI), and robotics into manufacturing processes can enhance efficiency, quality, and flexibility. However, the implementation of these technologies requires substantial capital investment and technical expertise. Small and medium-sized EMS and ODM companies may find it challenging to keep up with these advancements due to limited resources.

The rapid pace of innovation in end-user industries, such as consumer electronics, automotive, and telecommunications, puts additional pressure on EMS and ODM companies. For instance, the transition from 4G to 5G technology requires significant changes in design and manufacturing processes. Companies need to quickly adapt to new specifications and standards, which can strain their engineering and production capabilities.

The rise of new technologies, such as electric vehicles (EVs), autonomous driving, and renewable energy solutions, also presents opportunities and challenges. EMS and ODM companies must develop expertise in these emerging fields to remain competitive. This involves not only technological upgrades but also strategic partnerships and collaborations with industry leaders and startups.

Shorter product life cycles and increasing demand for customization further complicate the landscape. Companies need to be agile and responsive to market changes, which can be difficult when dealing with large-scale production and complex supply chains. Balancing the need for innovation with cost control and operational efficiency is a delicate task.

## Key Market Trends

### Expansion of Smart and Connected Devices

The expansion of smart and connected devices represents a pivotal trend driving the Global Electronics Manufacturing Services (EMS) and Original Design Manufacturing (ODM) markets. The proliferation of these devices is reshaping the technological landscape, influencing various sectors and consumer behaviors. This trend encompasses a wide array of products, including smartphones, wearables, smart home devices, and industrial IoT applications, all of which require advanced manufacturing and design capabilities. Smartphones and tablets remain at the forefront of the consumer electronics market, with continuous advancements in features and functionality. The demand for high-performance, reliable, and aesthetically pleasing devices has intensified. EMS and ODM providers are crucial in meeting this demand, offering the necessary expertise and state-of-the-art facilities to produce cutting-edge devices. The integration of high-resolution cameras, advanced processors, and longer-lasting batteries has pushed manufacturing complexity, making these providers indispensable.

Wearable technology, such as smartwatches and fitness trackers, has also seen significant growth. These devices not only serve as timepieces or fitness monitors but also integrate health tracking, GPS navigation, and communication functions. The miniaturization of components and the need for durable, lightweight materials challenge traditional manufacturing techniques. EMS and ODM providers leverage their advanced capabilities to meet these challenges, ensuring that wearable devices are both functional and comfortable for users. The smart home market is another major area experiencing rapid growth. Devices like smart speakers, thermostats, security cameras, and lighting systems are becoming increasingly popular as consumers seek to automate and enhance their living environments. These products require seamless connectivity, user-friendly interfaces, and robust security features. EMS and ODM providers play a critical role in developing and manufacturing these smart home solutions, ensuring they meet high standards of performance and security.

Industrial IoT applications are transforming industries by enabling smarter and more efficient operations. From manufacturing to logistics and healthcare, IoT devices are used to monitor and control processes in real-time. The reliability and precision required for these applications necessitate high-quality manufacturing. EMS and ODM providers offer the expertise to produce rugged, reliable IoT devices that can withstand harsh industrial environments while delivering consistent performance. 5G technology is accelerating the adoption of smart and connected devices by providing faster data speeds and more reliable connections. The rollout of 5G networks is driving demand for new infrastructure and devices capable of leveraging this technology. EMS and ODM providers are at the forefront of this transition, helping OEMs develop and produce 5G-enabled devices and network equipment. Their ability to scale production quickly and maintain high quality standards is crucial for the successful deployment of 5G technology.

### Shifts in Geopolitical Dynamics and Trade Policies

The global EMS and ODM market is profoundly affected by shifts in geopolitical dynamics and trade policies. The U.S.-China trade war, Brexit, and other international political developments have reshaped the landscape, impacting supply chains, manufacturing locations, and the cost of production.

The U.S.-China trade war introduced tariffs and restrictions that forced many companies to rethink their manufacturing strategies. To mitigate the risks associated with heavy reliance on Chinese manufacturing, companies started diversifying their supply chains. This led to a rise in EMS and ODM activities in other regions such as Southeast Asia,

India, and Mexico. Countries like Vietnam and Thailand emerged as attractive alternatives due to their relatively lower labor costs and improving manufacturing capabilities.

Brexit introduced uncertainties for companies operating within the European Union, prompting some to relocate their manufacturing or adjust their supply chains to avoid potential disruptions. The need for flexibility in response to changing trade regulations has underscored the importance of having a versatile and geographically diversified EMS and ODM network.

In addition to trade wars and political exits, regulatory changes, such as stricter environmental and labor laws in certain regions, are influencing manufacturing decisions. EMS and ODM providers must navigate these complex regulatory environments to ensure compliance and avoid penalties, adding another layer of strategic planning.

These geopolitical and trade-related shifts have emphasized the need for robust risk management strategies. Companies are increasingly investing in technologies such as AI and data analytics to predict and respond to geopolitical risks. This proactive approach allows them to maintain stability in their supply chains and manufacturing operations.

## Segmental Insights

### Type Insights

The Original Design Manufacturer (ODM) held the largest market share in 2023. The demand for personalized and customized products has surged, particularly in consumer electronics, automotive, and medical devices sectors. ODMs are well-positioned to meet this demand due to their capability to design and manufacture products according to specific client requirements. Unlike traditional contract manufacturers, ODMs offer end-to-end services that include design, development, and production. This comprehensive approach allows brands to bring unique and differentiated products to market quickly, giving ODMs a competitive edge.

Cost efficiency is a significant factor driving the dominance of ODMs. By leveraging economies of scale, ODMs can reduce production costs and offer competitive pricing to their clients. Many ODMs are based in regions with lower labor costs, such as China, Vietnam, and India, which further enhances their cost advantages. Additionally, ODMs

often have established relationships with component suppliers, enabling them to negotiate better prices and ensure a steady supply of materials. These cost benefits are passed on to clients, making ODMs an attractive option for brands looking to optimize their production budgets.

ODMs have been quick to adopt and integrate cutting-edge technologies into their manufacturing processes. This includes advancements in automation, robotics, artificial intelligence (AI), and Industry 4.0 principles. The use of these technologies allows ODMs to improve production efficiency, enhance product quality, and reduce time-to-market. For instance, AI-driven analytics can optimize production schedules, while robotics can ensure precision in assembly processes. By staying at the forefront of technological innovation, ODMs can meet the evolving needs of their clients more effectively than traditional manufacturers.

ODMs typically manage comprehensive supply chains that cover everything from component procurement to final assembly and distribution. This integrated approach results in greater supply chain efficiency and reliability. In a global market where supply chain disruptions can have significant impacts, the ability of ODMs to maintain seamless operations is a major advantage. Their expertise in logistics and inventory management ensures that products are delivered on time and meet quality standards, which is crucial for maintaining brand reputation and customer satisfaction.

## Regional Insights

North America held the largest market share in 2023. North America, particularly the United States, boasts a highly advanced technological infrastructure. This includes state-of-the-art manufacturing facilities, advanced logistics networks, and sophisticated supply chain management systems. The region's infrastructure supports the efficient production and distribution of electronic products, making it an attractive location for EMS and ODM providers.

High-speed internet, reliable power supply, and advanced automation technologies further enhance the manufacturing capabilities in North America. The region's ability to rapidly adopt and implement new technologies, such as AI, IoT, and robotics, gives it a competitive edge in the EMS and ODM market.

The strong demand for electronic products from various industries in North America significantly contributes to its leading market share. Key industries include consumer electronics, automotive, aerospace, healthcare, and telecommunications. The high



consumption of advanced electronic devices like smartphones, laptops, wearable tech, and home automation systems drives substantial business for EMS and ODM providers.

In the automotive sector, the shift towards electric vehicles (EVs) and autonomous driving technology has led to increased demand for sophisticated electronic components and systems. Similarly, the aerospace industry requires high-precision electronic components, further bolstering the EMS and ODM market in North America.

North America is home to a robust innovation ecosystem characterized by numerous tech hubs, research institutions, and a culture of entrepreneurship. Silicon Valley in California, for instance, is globally renowned as a center of technological innovation. This ecosystem fosters collaboration between tech companies, startups, universities, and research institutions, leading to the continuous development of cutting-edge technologies and products.

North America's highly skilled and educated workforce is a significant factor in its dominance of the EMS and ODM market. The region benefits from a strong emphasis on higher education and technical training, producing a steady stream of engineers, technicians, and skilled workers proficient in advanced manufacturing and design processes.

### Key Market Players

Hon Hai Precision Industry Co., Ltd.

Jabil Inc.

PEGATRON Corporation

Sanmina Corporation

Celestica Inc.

Wistron Corporation

Benchmark Electronics, Inc.

TT Electronics PLC

ASE Technology Holding Co., Ltd.,

Report Scope:

In this report, the Global EMS and ODM Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

EMS and ODM Market, By Type:

Electronics Manufacturing Services (EMS)

Original Design Manufacturer (ODM)

EMS and ODM Market, By Application:

Electronics

Servers and Storage

Networking

Others

EMS and ODM Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global EMS and ODM Market.

### Available Customizations:

Global EMS and ODM market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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