

IPC MARKET RESEARCH

2019 Annual Report and Forecast for the North American EMS Industry



Published September 2019

Strengthening & Advancing Electronics Manufacturing Globally

TABLE OF CONTENTS

Introduction	1
Industry Summary	2
Global and North American Markets	
EMS/ODM Market Size.....	3
Historical Market Growth Trends	3
Market Forecasts through 2023.....	4
Total Available North American Market and Potential for Growth	5
Company and Facility Counts.....	5
Vertical Markets Served in North America.....	6
Trends in Sales and Orders	
Historical Trends in Annual Sales Growth	14
Historical Trends in Quarterly Order and Sales Growth	16
EMS Book-to-Bill Ratio	17
Trends in EMS Order Backlogs	18
EMS Production	
Revenue by Types of Production	19
Domestic Production	21
Financial and Operational Measurements	
Revenue per Employee	22
Cost Structure of North American Companies	23
Pre-Tax Earnings	24
EBITDA	25
Return on Value Added	26
Cash-to-Cash Cycle Time.....	27
Days Sales Outstanding	28
Days of Supply in Inventory	29
Capacity Utilization	30
Appendices	
Survey Demographics	33
Vertical Market Definitions	34
Definitions of Terms Used in this Report	35
IPC Market Research Services	37