



CONTRACT & SUB-CONTRACT MANUFACTURING SERVICES

Supplier Capability Brief

Contract and sub-contract manufacturing partners play a critical role in defence industrial capacity, providing flexible, scalable and specialised production support across machining, fabrication, electronics, assembly, integration and test. As Europe accelerates rearmament and platform modernisation, Primes and OEMs require reliable manufacturing partners capable of delivering high-quality, compliant and secure production across multiple disciplines and platform types.

Core subcategories

- Precision machining and metalworking services
- Fabrication, welding and structural assembly
- Electronics manufacturing services (EMS) and PCBA production
- Mechanical and electro-mechanical assembly

- System integration, sub-assembly and kitting
- Composite and polymer-component production
- Surface finishing, coating and paint services
- Supply-chain management, logistics and vendor consolidation

Market outlook

Contract manufacturing is one of the fastest-expanding segments of the European defence supply chain as OEMs seek additional production capacity, surge capability, specialist skills and multi-tier resilience.

Growing platform demand, labour constraints and the need for rapid-production pathways are driving OEM reliance on high-quality contract manufacturing partners.

Key market indicators:

- **Global defence contract manufacturing:**
~\$45B in 2024 : ~\$65B by 2030 (CAGR ~6%)
- **Electronics manufacturing services (EMS):**
~\$575B globally, with strong defence/aerospace growth
- **Mechanical/metal contract manufacturing in defence:**
multi-billion-euro growth across EU rearmament efforts
- **System integration & assembly services:**
strong expansion driven by new land, air and missile programmes
~\$1.4B in 2024 : ~\$3.3B by 2030 (CAGR ~15-17%)

Typical defence applications

- Machined, fabricated and assembled components for land, air and naval systems
- Electronics production, PCBA assembly and subsystem integration
- Rapid prototyping, short-run production and pilot manufacturing

- Mechanical and electro-mechanical assemblies for vehicles and missiles
- Subsystem and module build for UAVs, UGVs, C4ISR and communications equipment
- Kitting, wiring, cabling and full integration support
- Build-to-print and build-to-specification manufacturing

Who should exhibit

- Precision machining and fabrication companies
- EMS providers and high-reliability PCBA manufacturers
- Mechanical and electro-mechanical assembly houses

- System integrators and module-build specialists
- Composite and polymer manufacturers with defence capability
- Surface finishing, coating and paint specialists
- Contract manufacturers supporting prototype-to-production scale-up

What primes & OEMs are looking for

- Flexible and scalable production capacity to support defence uplift
- High-reliability manufacturing with strong QA and traceability
- Suppliers able to deliver complex assemblies and integrated modules

- Build-to-print and build-to-spec expertise with engineering capability
- Secure manufacturing environments with defence compliance
- Capability to support urgent operational requirements and surge timelines
- Reliable European-based partners to strengthen supply-chain resilience

Showcase your **CONTRACT** and **SUB-CONTRACT MANUFACTURING CAPABILITIES** to defence engineering, procurement teams who are **ACTIVELY IDENTIFYING** and **ONBOARDING** new suppliers across Europe.

