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Automotive PCB Market - Global Outlook and Forecast 2019-2024

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Abstracts

The global automotive PCB market is expected to reach more than $14 billion during 2018–2024.

The rising applicability of rigid-flex PCBs, the penetration of in-vehicle infotainment systems, the arrival of new energy vehicles, and the increased potential of ADAS are expected to contribute to the growth of the global automotive PCB market.

The increased adoption of Advanced Driver Assistance Systems (ADAS) is driving the automotive printed circuit board (PCB) market. The utilization of printed circuit boards in ADAS systems is expected to witness significant traction in the coming years. Hence, vendors catering to the global automotive PCB market are eyeing to capitalize on this growing trend of ADAS installation in vehicles in the coming years. Further, the growing installation of in-vehicle Infotainment (IVI) systems is expected to push the demand for flexible printed circuit boards.

Digitalization of printed circuit board design simulations is emerging as a major concept in the global automotive PCB market. It ensures an effective prototype preparation before actual implementation is integrated into the simulation of the design process. Also, the electrification of engine mechanism and propulsion technologies is further expected to drive the automotive PCB market during the forecast period.

The study considers the present scenario of the automotive PCB market and its market dynamics for the period 2018?2024. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspect of the market. IT profiles and examines leading companies and other prominent companies operating in the automotive PCB market.

This research report on the automotive PCB market covers market sizing and forecast, market share, industry trends, growth drivers, and vendor analysis. The market study includes insights on segmentation by applications (interior components, engine control components, powertrain components, and vehicle lighting and safety), products (single side, flexible, and multi-layer), vehicle (passenger car, light commercial vehicle, and heavy trucks), and geography (APAC, Europe, Latin America, MEA, and North America).

Automotive PCB Market: Segmentation

This market research report includes detailed market segmentation by applications, products, vehicles, and geography. The single-side PCB segment captured the largest portion of the automotive PCB market in 2018. The extensive use of single side circuit boards in electronics such as automotive lighting systems, wiper systems, and electronic throttle modules is likely to propel the growth of the PCB market. Countries such as China, Taiwan, and South Korea are the largest producers of single side printed circuit boards. Multi-layer and flexible printed circuit boards are expected to witness considerable growth during the forecast period.

The growing demand for dashboard switches, stereo and audio components, digital screens and display systems, onboard radar systems, navigation systems, and onboard diagnostics has fueled the market for interior components. The interior components segment was the largest segment in the automotive PCB market in 2018. With the growing emphasis on safety regulations and enhanced driving experience, auto manufacturers are actively investing in developing advanced interior components. The APAC region was the most significant interior component market in 2018 and is likely to continue its hold on the market during the forecast period.

Engine control component segment was the second-largest contributor to the automotive printed circuit board market. The rise in the usage of ECUs is bound to increase the usage of processors and semiconductors, which indirectly will affect the growth of automotive printed circuit board market. Powertrain components are witnessing high adoption in hybrid and all-electric vehicles, thereby increasing the demand for printed circuit boards. Further, increased regulations on fuel emission norms is driving OEMs and tier I suppliers to focus on the electrification of powertrain components.

The passenger cars segmented accounted for more than half of the market share in

2018. The increased focus on safety regulations across passenger vehicles is the primary reason for the increased use of printed circuit boards.

Market Segmentation by Product

- Interior Components
- Engine Control Components
- Powertrain Components
- Vehicle Lighting and Safety

Market Segmentation by Product

- Single Side PCB
- Flexible PCB
- Multi-Layer PCB

Market Segmentation by Vehicle

- Passenger Car
- Light Commercial Vehicle
- Heavy Trucks

Automotive PCB Market: Geography

The APAC region, which consists of China, Japan, South Korea, and Taiwan, is witnessing a high surge in automotive production due to the availability of low labor and logistical costs. Enhanced production capacities, the rise of digitalization, and the consistent investment in the automotive industry are expected to drive the automotive printed circuit board industry in the region. The increased penetration of electric and hybrid vehicles in the US and Canada has made North America the second-largest geographical segment in the global automotive PCB market. The increasing demand for electric vehicles in Germany, the UK, and France is one of the major drivers for market growth in Europe.

Brazil is the leading market in the automotive PCB market in Latin America. However, political unrest in Venezuela, the dwindling Brazilian economy, and the vulnerability to natural disasters are likely to affect market growth in the Latin American region. Further, the MEA region is experiencing substantial growth as vendors are expanding their operational base.

Market Segmentation by Geography

- APAC
  - China
  - India
  - Indonesia
  - Japan
  - South Korea
  - Taiwan
  - Thailand
- Europe
  - France
  - Italy
  - Russia
  - UK

Germany

Latin America

Argentina

Brazil

MEA

Saudi Arabia

South Africa

UAE

North America

Canada

Mexico

US

Key Vendor Analysis

The automotive PCB market is highly competitive. The margin for error is extremely loss due to the stringent regulatory standards followed in the automotive sector and its ancillary components. However, the leading 5-6 vendors constitute the majority of the share in the market, which has led to moderate fragmentation. Also, the market competitiveness is expected to intensify further with an increase in product/service extensions, technological innovations, and M&As. Global players are likely to grow by acquiring regional or local players in the future. Further, companies with better technical and financial resources can develop innovative products to kill the competition. Therefore, vendors are expected to develop new technologies and remain abreast with upcoming technologies to have a competitive advantage over other vendors.

Key Vendors of the Automotive PCB Market

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Chin Poon

CMK Corp.

KCE Electronics

Kingboard Holdings

Meiko Electronics

NOK

Tripod Technology

TTM Technologies

Other Vendors

A-Flex

Amphenol

AT&S or Austria Technologie&Systemtechnik

Cisel

Daeduck Electronics

ELNA

Elvia PCB

Genus Electrotech

GUH Holding Berhad

Kyoden

- Liang Dar Technology
- Multek
- RayMing Technology
- Ronak Circuits
- Schweizer
- Shirai Electronics Industry
- SOMACIS
- Super PCB
- TPT (Taiwan PCB Techvest)
- Unimicron
- Unitech
- WUS Printed Circuit

Key Market Insights

The analysis of the automotive PCB market provides market sizing and growth opportunities for the forecast period 2019–2024.

- Offers market sizing and growth prospects of the automotive PCB market for the forecast period 2019–2024.
- Provides comprehensive insights on the latest industry trends, market forecast, and growth drivers in the automotive PCB market.
- Includes a detailed analysis of market growth drivers, challenges, and investment opportunities.

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Delivers a complete overview of market segments and the regional outlook of the automotive PCB market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key market strategies to gain a competitive advantage in the automotive PCB market.

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