

Global Copper Clad Laminates Market: Analysis By Type (Rigid and Flexible), By Application (Communication Systems, Computers, Consumer Electronics, Automotive Electronics, Industrial Electronics, Medical Equipment, and Others), By Reinforcement Material (Fiberglass, Special Substrates Base, Compound, and Paper Base), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

<https://marketpublishers.com/r/GE55C36A0C50EN.html>

Date: February 2023

Pages: 156

Price: US\$ 2,250.00 (Single User License)

ID: GE55C36A0C50EN

Abstracts

The global copper-clad laminates market was valued at US\$15.08 billion in 2022. The market value is expected to reach US\$21.20 billion by 2028. A copper-clad laminate (CCL) is a board-like material that is made by immersing electronic fiberglass cloth or other reinforcing materials in resin, and then covering that with copper foil on one or both sides before it is hot-pressed. A key application for copper-clad laminates is in the manufacture of printed circuit boards (PCBs) used to mechanically support and connect electronic components.

In the coming years, the copper-clad laminate market is expected to be benefited from the ongoing construction of 5G base stations, the rapid development of cloud computing, and auto electrification. Server platform upgrades have also boosted the consumption of high-performance PCBs and CCLs. Moreover, the electrification and intelligentization of automobiles have created scenarios for PCB and CCL applications, leading to market growth. The market is expected to grow at a CAGR of approx. 6% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the market into two types: Rigid and Flexible. The rigid CCL held the highest share of the market. The increasing demand for electric vehicles and the innovations in electronic machines are expected to boost the demand for rigid copper-clad laminate in the forthcoming years. Whereas flexible laminates have lesser weight, thinness, and better flexibility as compared to rigid laminates, and hence is used in different applications like electronic products, including cellphone, digital camera, automotive GPS, and laptop.

By Application: The report further provides the analysis based on applications: Communication Systems, Computers, Consumer Electronics, Automotive Electronics, Industrial Electronics, Medical Equipment, and Others. Communication systems held the highest share in the market, whereas automotive electronics is expected to be the fastest-growing segment in the forecasted period. The demand for copper-clad laminates in communication systems is driven by the swelling demand for 5G infrastructure. Further, server upgrades have jacked up demand for high-performance PCBs and CCLs that can offer high frequencies and high speeds. Therefore, as an investment in 5G infrastructure increases, it is expected that global server construction to boost PCB and CCL market demand during forthcoming years.

By Reinforcement Material: The report provides a glimpse of the global rigid copper-clad laminates market based on the following reinforcement materials: Fiberglass, Special Substrates Base, Compound, and Paper Base. Fiberglass cloth-focused CCL includes FR-5 and FR-4. FR-4 (Flame Retardant-4) is a material consisting of a woven glass fiber cloth and an epoxy resin laminate material that is self-extinguishing (flame resistant). FR-4 has excellent performance and is cheaper than some special materials. Meanwhile, this material has been fully studied, so it can be modified to produce a wide range of benefits such as a halogen-free type. On the other hand, as high-frequency and high-speed applications such as 5G, IoT, and data centers became commonplace, the market share of special CCLs is expected to rise in the coming years.

By Region: The report provides insight into the copper-clad laminates market based on the regions namely, Asia Pacific, North America, Europe, and the Rest of the World. Asia Pacific held the major share of the copper-clad laminates market in 2022. It is also expected to be the fastest-growing region in the forthcoming years.

With the rise of Chinese mainland server manufacturers and a growing domestic server market, development opportunities have opened up for local providers of high-frequency

and high-speed CCLs. For instance, by 2021, the number of 5G base stations in China had reached 1.42 million, with over 0.65 million new stations built in that year alone, and 5G investment had grown by 45.6% of total investments in the communications industry, based on data presented in the 2021 Statistical Bulletin of the Communications Industry issued by The Ministry of Industry and Information Technology (MIIT).

The Internet of Things (IoT) is one of the most promising innovation accelerators for digital enterprises. According to Germany Trade and Invest (GTAI), within Germany, IoT spending would exceed US\$37.45 billion (EUR35 billion) (making Germany the biggest spender in Europe) in 2021. The increase in IoT spending would generate demand prospects for PCB and CCL manufacturers in the coming years.

Market Dynamics:

Growth Drivers: The global copper-clad laminates market growth is predicted to be supported by numerous growth drivers such as increasing demand for consumer electronics, increasing demand for vehicles, increasing disposable income, growing use of medical devices, growing industrial robot industry, and many other factors. Automation requires the use of robots and their electronic components. Among the most important aspects of robotics is the printed circuit board (PCB) used for electronic control and operation. With multiple industries that use robotics, finding PCB solutions that meet the various needs of automated devices has become even more valuable. Hence, the increase in the industrial robotic industry boosts the demand for PCBs which, in turn, propels the demand for CCL.

Challenges: However, the market growth would be negatively impacted by various challenges such as rising copper prices, shortage of raw materials, chip shortage crisis, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as rapid development of cloud computing and server market, increasing auto electrification, rising IoT market, increasing construction of 5G base station, etc. The electrification and intelligentization of automobiles have created scenarios for PCB and CCL applications, including electrical control systems for new energy vehicles (NEVs), advanced driver assistance systems (ADAS), and intelligent cockpits. As key function-bearing components of automotive electronics, PCBs would benefit substantially from the increase in automotive electronic content resulting from auto electrification and intelligentization. This would further increase the demand for CCL in the coming years.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic slowed the copper-clad laminates industry's growth in 2020. Due to blockage in trade and services across the globe, disruption in raw material supply, the surge in instrument and equipment prices, and a ban on transportation, the market was impacted heavily. Moreover, the COVID-19 outbreak has negatively affected PCB demand due to the supply chain fallout and a decline in demand from the industrial and automotive sectors, which has further decelerated the CCL market growth. However, the demand for edge computing emerges as the new driving force of the server market and would evolve and develop with the deployment of 5G infrastructure. This would stimulate the demand for PCB and CCL in the coming years, simultaneously.

Competitive Landscape:

The global copper-clad laminates market is highly concentrated. In 2022, the world's top five CCL manufacturers (Kingboard Laminates, SYTECH, Nan YaPlastics, Elite Material (EMC), and ITEQ) had a combined market share of around 51%.

The key players in the global copper-clad laminates market are:

Elite Material Co. Ltd. (EMC)

Showa Denko K.K./ Resonac Holdings Corporation

Doosan Corp.

Mitsubishi Gas Chemical Company, Inc.

Rogers Corporation

Kingboard Laminates Holdings Ltd.

ITEQ Corporation

Nan Ya Plastics Corporation

Shengyi Technology Co., Ltd.

Taiwan Union Technology Corporation (TUC)

Isola Group

Goldenmax International Group Ltd.

Key manufacturers in the industry globally have consequently taken measures such as product transformation and capacity expansion to strengthen the business of copper-clad laminate production. Some of the strategies among key players in the market are mergers, acquisitions, and collaborations. For instance, in 2023, Resonac Corporation announced new multiyear contracts with Infineon Technologies AG (Infineon) to continue supplying SiC materials for power semiconductors to Infineon and cooperatively developing technologies related to SiC materials. On the other hand, in 2022, Doosan Corporation announced that the company has been advancing into the 5G antenna module business in partnership with Movandi Corporation.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Copper Clad Laminates: An Overview

2.1.1 Introduction to Copper Clad Laminates

2.1.2 Copper Clad Laminates and PCB Manufacturing Process

2.2 Copper Clad Laminates Segmentation: An Overview

2.2.1 Copper Clad Laminates Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Copper Clad Laminates Market: An Analysis

3.1.1 Global Copper Clad Laminates Market: An Overview

3.1.2 Global Copper Clad Laminates Market by Value

3.1.3 Global Copper Clad Laminates Market by Type (Rigid and Flexible)

3.1.4 Global Copper Clad Laminates Market by Application (Communication Systems, Computers, Consumer Electronics, Automotive Electronics, Industrial Electronics, Medical Equipment, and Others)

3.1.5 Global Copper Clad Laminates Market by Region (Asia Pacific, North America, Europe, and Rest of the World)

3.2 Global Copper Clad Laminates Market: Type Analysis

3.2.1 Global Copper Clad Laminates Market by Type: An Overview

3.2.2 Global Rigid Copper Clad Laminates Market by Value

3.2.3 Global Rigid Copper Clad Laminates Market by Reinforcement Material (Fiberglass, Special Substrates Base, Compound, and Paper Base)

3.2.4 Global Flexible Copper Clad Laminates Market by Value

3.3 Global Copper Clad Laminates Market: Application Analysis

3.3.1 Global Copper Clad Laminates Market by Application: An Overview

3.3.2 Global Communication Systems Copper Clad Laminates Market by Value

3.3.3 Global Computers Copper Clad Laminates Market by Value

3.3.4 Global Consumer Electronics Copper Clad Laminates Market by Value

3.3.5 Global Automotive Electronics Copper Clad Laminates Market by Value

3.3.6 Global Industrial Electronics Copper Clad Laminates Market by Value

3.3.7 Global Medical Equipment Copper Clad Laminates Market by Value

3.3.8 Global Others Copper Clad Laminates Market by Value

3.4 Global Rigid Copper Clad Laminates Market: Reinforcement Material Analysis

3.4.1 Global Rigid Copper Clad Laminates Market by Reinforcement Material: An Overview

3.4.2 Global Fiberglass Rigid Copper Clad Laminates Market by Value

3.4.3 Global Fiberglass Rigid Copper Clad Laminates Market by Type (Conventional FR-4, Halogen Free, and High TG FR-4)

3.4.4 Global Special Substrates Base Rigid Copper Clad Laminates Market by Value

3.4.5 Global Special Substrates Base Rigid Copper Clad Laminates Market by Type (High Speed, PKG Substrate, High Frequency, and Others)

3.4.6 Global Compound Rigid Copper Clad Laminates Market by Value

3.4.7 Global Paper Base Rigid Copper Clad Laminates Market by Value

4. REGIONAL MARKET ANALYSIS

4.1 Asia Pacific Copper Clad Laminates Market: An Analysis

4.1.1 Asia Pacific Copper Clad Laminates Market: An Overview

4.1.2 Asia Pacific Copper Clad Laminates Market by Value

4.1.3 Asia Pacific Copper Clad Laminates Market by Region (China, Taiwan, South Korea, Japan, and Rest of the Asia Pacific)

4.1.4 China Copper Clad Laminates Market by Value

4.1.5 Taiwan Copper Clad Laminates Market by Value

4.1.6 South Korea Copper Clad Laminates Market by Value

4.1.7 Japan Copper Clad Laminates Market by Value

4.1.8 Rest of Asia Pacific Copper Clad Laminates Market by Value

4.2 North America Copper Clad Laminates Market: An Analysis

4.2.1 North America Copper Clad Laminates Market: An Overview

4.2.2 North America Copper Clad Laminates Market by Value

4.2.3 North America Copper Clad Laminates Market by Region (The US, Canada, and Mexico)

4.2.4 The US Copper Clad Laminates Market by Value

4.2.5 Canada Copper Clad Laminates Market by Value

4.2.6 Mexico Copper Clad Laminates Market by Value

4.3 Europe Copper Clad Laminates Market: An Analysis

4.3.1 Europe Copper Clad Laminates Market: An Overview

4.3.2 Europe Copper Clad Laminates Market by Value

4.3.3 Europe Copper Clad Laminates Market by Region (Germany, Italy, UK, France, Spain, and Rest of the Europe)

4.3.4 Germany Copper Clad Laminates Market by Value

4.3.5 Italy Copper Clad Laminates Market by Value

4.3.6 The UK Copper Clad Laminates Market by Value

- 4.3.7 France Copper Clad Laminates Market by Value
- 4.3.8 Spain Copper Clad Laminates Market by Value
- 4.3.9 Rest of Europe Copper Clad Laminates Market by Value
- 4.4 Rest of World Copper Clad Laminates Market: An Analysis
 - 4.4.1 Rest of World Copper Clad Laminates Market: An Overview
 - 4.4.2 Rest of World Copper Clad Laminates Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Global Copper Clad Laminate Market
- 5.2 Post COVID-19 Impact on Global Copper Clad Laminate Market

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Increasing Demand for Consumer Electronics
 - 6.1.2 Increasing Demand For Vehicles
 - 6.1.3 Increasing Disposable Income
 - 6.1.4 Growing Use of Medical Devices
 - 6.1.5 Growing Industrial Robot Industry
- 6.2 Challenges
 - 6.2.1 Shortage of Raw Materials
 - 6.2.2 Chip Shortage Crisis
 - 6.2.3 Rising Copper Prices
- 6.3 Market Trends
 - 6.3.1 Rapid Development of Cloud Computing and Server Market
 - 6.3.2 Increasing Auto Electrification
 - 6.3.3 Rising IoT Market
 - 6.3.4 Increasing Construction of 5G Base Station

7. COMPETITIVE LANDSCAPE

- 7.1 Global Copper Clad Laminate Players by Market Share
- 7.2 Global Rigid Copper Clad Laminate Players by Market Share

8. COMPANY PROFILES

- 8.1 Elite Material Co. Ltd. (EMC)
 - 8.1.1 Business Overview

- 8.1.2 Revenue by Product
- 8.1.3 Business Strategies
- 8.2 Showa Denko K.K./ Resonac Holdings Corporation
 - 8.2.1 Business Overview
 - 8.2.2 Operating Segments
 - 8.2.3 Business Strategies
- 8.3 Doosan Corp.
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segments
 - 8.3.3 Business Strategies
- 8.4 Mitsubishi Gas Chemical Company, Inc.
 - 8.4.1 Business Overview
 - 8.4.2 Operating Segments
 - 8.4.3 Business Strategies
- 8.5 Rogers Corporation
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segments
 - 8.5.3 Business Strategies
- 8.6 Kingboard Laminates Holdings Ltd.
 - 8.6.1 Business Overview
 - 8.6.2 Operating Segments
- 8.7 ITEQ Corporation
 - 8.7.1 Business Overview
 - 8.7.2 Revenue by Product
- 8.8 Nan Ya Plastics Corporation
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
- 8.9 Shengyi Technology Co., Ltd.
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategies
- 8.10 Taiwan Union Technology Corporation (TUC)
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategies
- 8.11 Isola Group
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategies
- 8.12 Goldenmax International Group Ltd.
 - 8.12.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Copper Clad Laminates Structure

Figure 2: Copper Clad Laminates and PCB Manufacturing Process

Figure 3: Copper Clad Laminates Segmentation

Figure 4: Global Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 5: Global Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 6: Global Copper Clad Laminates Market by Type; 2022 (Percentage, %)

Figure 7: Global Copper Clad Laminates Market by Application; 2022 (Percentage, %)

Figure 8: Global Copper Clad Laminates Market by Region; 2022 (Percentage, %)

Figure 9: Global Rigid Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 10: Global Rigid Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 11: Global Rigid Copper Clad Laminates Market by Reinforcement Material; 2022 (Percentage, %)

Figure 12: Global Flexible Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 13: Global Flexible Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 14: Global Communication Systems Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 15: Global Communication Systems Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 16: Global Computers Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 17: Global Computers Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 18: Global Consumer Electronics Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 19: Global Consumer Electronics Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 20: Global Automotive Electronics Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 21: Global Automotive Electronics Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 22: Global Industrial Electronics Copper Clad Laminates Market by Value;

2018-2022 (US\$ Million)

Figure 23: Global Industrial Electronics Copper Clad Laminates Market by Value;

2023-2028 (US\$ Million)

Figure 24: Global Medical Equipment Copper Clad Laminates Market by Value;

2018-2022 (US\$ Million)

Figure 25: Global Medical Equipment Copper Clad Laminates Market by Value;

2023-2028 (US\$ Million)

Figure 26: Global Others Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 27: Global Others Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 28: Global Fiberglass Rigid Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 29: Global Fiberglass Rigid Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 30: Global Fiberglass Rigid Copper Clad Laminates Market by Type; 2022 (Percentage, %)

Figure 31: Global Special Substrates Base Rigid Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 32: Global Special Substrates Base Rigid Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 33: Global Special Substrates Base Rigid Copper Clad Laminates Market by Type; 2022 (Percentage, %)

Figure 34: Global Compound Rigid Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 35: Global Compound Rigid Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 36: Global Paper Base Rigid Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 37: Global Paper Base Rigid Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 38: Asia Pacific Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 39: Asia Pacific Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 40: Asia Pacific Copper Clad Laminates Market by Region; 2022 (Percentage, %)

Figure 41: China Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 42: China Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 43: Taiwan Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 44: Taiwan Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 45: South Korea Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 46: South Korea Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 47: Japan Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 48: Japan Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 49: Rest of Asia Pacific Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 50: Rest of Asia Pacific Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 51: North America Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 52: North America Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 53: North America Copper Clad Laminates Market by Region; 2022 (Percentage, %)

Figure 54: The US Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 55: The US Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 56: Canada Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 57: Canada Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 58: Mexico Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 59: Mexico Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 60: Europe Copper Clad Laminates Market by Value; 2018-2022 (US\$ Billion)

Figure 61: Europe Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 62: Europe Copper Clad Laminates Market by Region; 2022 (Percentage, %)

Figure 63: Germany Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 64: Germany Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 65: Italy Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 66: Italy Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 67: The UK Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 68: The UK Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 69: France Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 70: France Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 71: Spain Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 72: Spain Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 73: Rest of Europe Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 74: Rest of Europe Copper Clad Laminates Market by Value; 2023-2028 (US\$ Billion)

Figure 75: Rest of World Copper Clad Laminates Market by Value; 2018-2022 (US\$ Million)

Figure 76: Rest of World Copper Clad Laminates Market by Value; 2023-2028 (US\$ Million)

Figure 77: Global Consumer Electronics Market Revenue; 2017-2027 (US\$ Billion)

Figure 78: Global Number of Light Vehicle Registrations; 2017-2026 (Million)

Figure 79: Advanced Economies and Emerging Market & Developing Economies GDP Per Capita; 2018-2027 (US\$ Thousand)

Figure 80: Global Medical Devices Market Size; 2021-2027 (US\$ Billion)

Figure 81: Global Annual Installation of Industrial Robots; 2015-2021 (Million)

Figure 82: Global Server Market Revenue; 2019-2025 (US\$ Billion)

Figure 83: Global Automotive Electronics Market Size; 2021-2027 (US\$ Billion)

Figure 84: Global Number of Active IoT Connections; 2015-2025 (Billion)

Figure 85: Global Copper Clad Laminate Players by Market Share; 2022 (Percentage, %)

Figure 86: Global Rigid Copper Clad Laminate Players by Market Share; 2022 (Percentage, %)

Figure 87: Elite Material Co. Ltd. Revenue by Product; 2021 (Percentage, %)

Figure 88: Showa Denko K.K. Sales by Segment; 2021 (Percentage, %)

Figure 89: Doosan Corp. Sales by Segment; 2021 (Percentage, %)

Figure 90: Mitsubishi Gas Chemical Company, Inc. Net Sales by Segment; 2022 (Percentage, %)

Figure 91: Rogers Corporation Net Sales by Segment; 2021 (Percentage, %)

Figure 92: Kingboard Laminates Holdings Ltd. Revenue by Operating Segments; 2021 (Percentage, %)

Figure 93: ITEQ Corporation Revenue by Product; 2021 (Percentage, %)

Figure 94: Nan Ya Plastics Corporation Revenue by Segment; 2021 (Percentage, %)

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