

Global Cavity PCBs Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cavity PCBs market size is expected to reach \$ 2164 million by 2032, rising at a market growth of 9.0% CAGR during the forecast period (2026-2032).

Cavity Printed Circuit Boards are specialized PCB structures in which selected board areas are recessed, stepped, opened, or internally formed as cavities through controlled-depth milling, laser removal, selective layer removal, pre-cut lamination, anti-resin-flow processing, or embedded cavity construction. This market focuses on cavity PCBs, step cavity PCBs, embedded cavity PCBs, 2.5D cavity PCBs, COB cavity PCBs, RF air-cavity PCBs, and thermal cavity PCBs where the cavity is part of the PCB structure. These products are used to lower component height, integrate chips or sensors, improve thermal paths, reduce signal losses, optimize RF or microwave performance, and enable compact module packaging. Major applications include mobile modules, RF and millimeter-wave antennas, optical modules, medical miniaturized devices, automotive radar, industrial sensors, power thermal modules, aerospace electronics, and defense systems.

Key Findings

Cavity PCBs are mainly used in high-end miniaturized modules

2.5D cavity technology is strengthening low-profile PCB design

RF, medical, automotive, and optical modules are key value applications

China, Europe, Japan, and North America form the main supply base

The market is usually disclosed as process capability rather than a standalone PCB category

Market Trends

The Cavity Printed Circuit Boards market is moving from mechanical step-slot processing toward more integrated 2.5D, HDI, SLP, RF, COB, and thermal-management structures. Product development is increasingly focused on tighter depth tolerance, cleaner inner-layer exposure, better resin-flow control, precise component recesses, improved RF behavior, and compatibility with automated assembly. As electronic modules become thinner and more functional, cavity structures are becoming an enabling feature rather than a simple mechanical cutout.

Market Dynamics

Drivers

Demand is driven by electronic miniaturization, low-profile modules, RF and millimeter-wave integration, optical communication modules, medical microelectronics, automotive radar, and advanced sensor packaging. Cavity PCBs help customers place components lower within the board, reduce package height, shorten electrical paths, and integrate thermal or electromagnetic functions into the PCB structure.

Restraints

Market expansion is constrained by process complexity, low production yield in tight-tolerance designs, limited standardization, and the difficulty of separating cavity PCB revenue from broader HDI, SLP, RF, and rigid-flex PCB categories. For cost-sensitive applications, customers may choose ordinary HDI boards or simpler mechanical cutouts instead of precision cavity structures.

Opportunities

Growth opportunities are strongest in 2.5D cavity PCB, COB cavity boards, RF air-cavity structures, automotive radar modules, medical implantable devices, optical

transceiver modules, and high-density sensor packaging. Suppliers with strong lamination, controlled-depth routing, laser processing, RF material handling, and high-reliability inspection capabilities are better positioned for premium applications.

Challenges

Key challenges include depth control, resin flow, cavity edge quality, inner-layer exposure, local flatness, warpage, plating reliability, soldering compatibility, and assembly yield. Suppliers must prove that cavity structures can be manufactured repeatedly at volume while maintaining electrical, mechanical, and thermal reliability.

Industry Chain Analysis

The upstream chain includes copper-clad laminates, high-frequency materials, build-up films, prepregs, copper foils, laser equipment, CNC routing systems, imaging tools, plating chemistry, solder masks, surface finishes, and inspection equipment. Midstream manufacturers produce cavity PCBs using controlled-depth milling, laser cavity formation, selective layer removal, pre-cut lamination, and hybrid metallization processes. Downstream customers include module makers, semiconductor packaging companies, optical communication suppliers, RF and antenna module producers, medical device companies, automotive electronics suppliers, aerospace contractors, and industrial sensor manufacturers.

Value creation is concentrated in design-for-manufacturing support, cavity tolerance control, lamination process design, local planarity, material compatibility, RF modeling, heat-spreading structure, and assembly compatibility. While simple step slots are price competitive, 2.5D cavity, COB cavity, RF air-cavity, and high-reliability medical or aerospace cavity boards support higher value.

Segment Insights

By cavity structure, open surface cavity PCBs and step cavity PCBs account for the largest share because they are widely used in component recess, low-profile modules, and mechanical integration. Embedded cavity, COB cavity, RF air-cavity, and thermal cavity structures are smaller but more technically differentiated and usually carry higher value per board.

By base PCB platform, rigid multilayer and HDI cavity PCBs form the broadest market base, while RF/microwave cavity boards and substrate-like cavity PCBs are gaining importance in high-frequency, optical, and miniaturized module applications. Rigid-flex cavity boards remain more specialized but are relevant in compact medical and high-reliability designs.

Downstream Market Opportunities

The most attractive downstream opportunities are in applications where board thickness, signal path, thermal behavior, and package integration directly affect product performance. Mobile modules, optical modules, automotive radar, medical microelectronics, RF front-end modules, and aerospace electronics are expected to support higher demand for precision cavity PCB structures.

Regional Insights

Mainland China is an important production region because of its broad PCB manufacturing base, fast prototyping ecosystem, and high-end PCB capacity expansion. Europe and Japan are strong in precision PCB processes, automotive and industrial applications, and specialty cavity board technologies. North America remains important in aerospace, defense, RF, and medical cavity PCB supply, while Israel has a specialized position in radar, medical, and advanced PCB technologies.

Regional competition is highly segmented. Large advanced PCB platforms compete on technology breadth and high-reliability programs, while smaller Chinese manufacturers compete in fast-turn, high-frequency, and customized step-cavity projects. Publicly disclosed evidence is uneven, so supplier qualification should focus on actual process capability, yield control, and application history.

Competitive Landscape Analysis

The market includes advanced PCB platform suppliers, Japanese precision PCB manufacturers, RF and medical PCB specialists, and China-based high-end PCB and quick-turn manufacturers. AT&S, TTM Technologies, Shennan Circuits, PCB Technologies, DAISHO DENSHI, Shinko, Schweizer Electronic, GS Swiss PCB, Taiyo Technologies, and NIHON MICRON form the higher-confidence global supplier group.

Shengyi Electronics, Kinwong, ALCANTA, Rocket PCB, SprintPCB, Huabangxin, APCT/Advanced Circuits, and other regional suppliers participate through step cavity, air cavity, RF cavity, or special-process PCB capabilities. Competition is shifting from basic cavity machining toward 2.5D integration, RF performance, assembly compatibility, thermal design, process repeatability, and high-reliability qualification.

Report Scope

This report studies the global Cavity PCBs production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cavity PCBs and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Cavity PCBs that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cavity PCBs total production and demand, 2021-2032, (K Units)

Global Cavity PCBs total production value, 2021-2032, (USD Million)

Global Cavity PCBs production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Cavity PCBs consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Cavity PCBs domestic production, consumption, key domestic manufacturers and share

Global Cavity PCBs production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Cavity PCBs production by Cavity Structure, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Cavity PCBs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Cavity PCBs market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include AT&S Austria Technologie & Systemtechnik AG, TTM Technologies, Inc., Shennan Circuits Co., Ltd., PCB Technologies Ltd., DAISHO DENSHI CO., LTD., Shinko Co., Ltd., Schweizer Electronic AG, GS Swiss PCB AG, Taiyo Technologies Co., Ltd., NIHON MICRON Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Cavity PCBs market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Cavity Structure, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Cavity PCBs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Cavity PCBs Market, Segmentation by Cavity Structure:

Open Surface Cavity PCB

Step Cavity / Step Slot PCB

Embedded / Buried Cavity PCB

COB / Die Cavity PCB

RF / Air Cavity PCB

Global Cavity PCBs Market, Segmentation by Cavity Function:

Component Recess and Height Reduction

RF / Electromagnetic Performance Optimization

Thermal Management and Heat Spreading

Chip-on-Board / Die Attachment

Connector / Mechanical Integration

Sensor / Micro-Module Packaging

Global Cavity PCBs Market, Segmentation by Base PCB Platform:

Rigid Multilayer Cavity PCB

HDI Cavity PCB

Rigid-Flex Cavity PCB

RF / Microwave Cavity PCB

Substrate-Like / Package Cavity PCB

Metal-Core / Thermal Cavity PCB

Global Cavity PCBs Market, Segmentation by Application:

Mobile and Miniaturized Modules

RF, Microwave and Antenna Modules

Optical Modules and High-Speed Communications

Medical and Implantable Electronics

Automotive Electronics and Radar

Aerospace, Defense and Industrial

Companies Profiled:

AT&S Austria Technologie & Systemtechnik AG

TTM Technologies, Inc.

Shennan Circuits Co., Ltd.

PCB Technologies Ltd.

DAISHO DENSHI CO., LTD.

Shinko Co., Ltd.

Schweizer Electronic AG

GS Swiss PCB AG

Taiyo Technologies Co., Ltd.

NIHON MICRON Co., Ltd.

Shengyi Electronics Co., Ltd.

Kinwong Electronic Co., Ltd.

ALCANTA PCB

Rocket PCB

Shenzhen SprintPCB

Shenzhen Huabangxin Technology

Advanced Circuits

Shenzhen Wanchuang Xingda Circuit

Key Questions Answered

1. How big is the global Cavity PCBs market?
2. What is the demand of the global Cavity PCBs market?
3. What is the year over year growth of the global Cavity PCBs market?
4. What is the total value of the global Cavity PCBs market?
5. Who are the Major Players in the global Cavity PCBs market?
6. What are the growth factors driving the market demand?

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