

Global Cavity PCBs Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Cavity PCBs market size was valued at US\$ 1152 million in 2025 and is forecast to a readjusted size of US\$ 2164 million by 2032 with a CAGR of 9.0% during review period.

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 is a detailed and comprehensive analysis for global Cavity PCBs market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Cavity Structure and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Cavity PCBs market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Cavity PCBs market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Cavity PCBs market size and forecasts, by Cavity Structure and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Cavity PCBs market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Cavity PCBs

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Cavity PCBs market based on the following parameters - company overview, sales quantity, revenue, 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.

Cavity PCBs market is split by Cavity Structure and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Cavity Structure, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Cavity Structure

Open Surface Cavity PCB

Step Cavity / Step Slot PCB

Embedded / Buried Cavity PCB

COB / Die Cavity PCB

RF / Air Cavity PCB

Market segment 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

Market segment 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

Market segment 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

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Cavity PCBs product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Cavity PCBs, with price, sales quantity, revenue, and global market share of Cavity PCBs from 2021 to 2026.

Chapter 3, the Cavity PCBs competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Cavity PCBs breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Cavity Structure and by Application, with

sales market share and growth rate by Cavity Structure, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Cavity PCBs market forecast, by regions, by Cavity Structure, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Cavity PCBs.

Chapter 14 and 15, to describe Cavity PCBs sales channel, distributors, customers, research findings and conclusion.

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