

# Global HDI Rigid-Flex PCB Market Growth 2026-2032

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## Abstracts

The global HDI Rigid-Flex PCB market size is predicted to grow from US\$ 913 million in 2025 to US\$ 1383 million in 2032; it is expected to grow at a CAGR of 6.4% from 2026 to 2032.

HDI rigid-flex PCBs represent a high-end category of printed circuit boards that integrate flexible printed circuits (FPCs) and rigid PCBs through a lamination process, while incorporating High-Density Interconnect (HDI) technologies?specifically, micro-blind/buried vias and fine line widths. Characterized by high space utilization efficiency, lightweight design, exceptional reliability, and capabilities for three-dimensional assembly, these boards are primarily utilized in electronic products with extremely stringent requirements regarding structural integrity and signal transmission?such as smartphones, high-end medical equipment, and aerospace systems.

The value chain for HDI rigid-flex PCBs is characterized by exceptionally high technological barriers and demanding requirements for resource integration. Upstream core raw materials include ultra-thin, high-frequency copper-clad flexible laminates; low-flow prepregs; polyimide (PI) films; and high-performance copper foils. Given that HDI technology necessitates micro-via drilling, the dimensional stability and laser processing compatibility of these materials are of critical importance; consequently, the sector currently exhibits a significant reliance on imported high-end raw materials. The midstream segment comprises a complex manufacturing process that integrates laser drilling, vacuum lamination, circuit patterning via subtractive or semi-additive methods, and precision interconnection technologies for blind and buried vias. Compared to standard PCBs, the manufacturing of HDI rigid-flex boards involves a workflow that is several times more extensive, thereby posing rigorous challenges regarding interlayer alignment precision and yield control. Downstream applications are highly concentrated in end-devices that demand the utmost in space utilization and signal transmission integrity?spanning diverse fields such as foldable smartphones, high-end medical

implants, and microsatellites.

The pricing of HDI rigid-flex PCBs varies significantly, primarily depending on factors such as the number of layers and the HDI build-up complexity (order); prices generally range from \$70 to over \$500 per board, with gross margins typically falling between 25% and 35%.

United States market for HDI Rigid-Flex PCB is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for HDI Rigid-Flex PCB is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for HDI Rigid-Flex PCB is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key HDI Rigid-Flex PCB players cover TTM Technologies (US), AT&S (AT), Meiko (JP), Multek (US), Unimicron Technology (TW), etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LP Information, Inc. (LPI) ' newest research report, the 'HDI Rigid-Flex PCB Industry Forecast' looks at past sales and reviews total world HDI Rigid-Flex PCB sales in 2025, providing a comprehensive analysis by region and market sector of projected HDI Rigid-Flex PCB sales for 2026 through 2032. With HDI Rigid-Flex PCB sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world HDI Rigid-Flex PCB industry.

This Insight Report provides a comprehensive analysis of the global HDI Rigid-Flex PCB landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on HDI Rigid-Flex PCB portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global HDI Rigid-Flex PCB market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for HDI Rigid-Flex PCB and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up

qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global HDI Rigid-Flex PCB.

This report presents a comprehensive overview, market shares, and growth opportunities of HDI Rigid-Flex PCB market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

1-Stage

2-Stage

3-Stage and Above

#### Segmentation by Interconnect Structure:

Blind Via Type

Buried Via Type

Stacked Microvia Type

Other

#### Segmentation by Number of Layers:

6?8 Layers

10?14 Layers

Other

#### Segmentation by Application:

Consumer Electronics

Medical Devices

Communications & Optical Modules

Aerospace

Industrial Control

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

TTM Technologies (US)

AT&S (AT)

Meiko (JP)

Multek (US)

Unimicron Technology (TW)

Kinwong Electronic (CN)

Zhongfu Circuit (CN)

Zhen Ding Tech. Group (TW)

Compeq Manufacturing (TW)

### **Key Questions Addressed in this Report**

What is the 10-year outlook for the global HDI Rigid-Flex PCB market?

What factors are driving HDI Rigid-Flex PCB market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do HDI Rigid-Flex PCB market opportunities vary by end market size?

How does HDI Rigid-Flex PCB break out by Type, by Application?

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