

Substrate-Like PCB Market by Line/Spacing (25/25 & 30/30 μm and Less than 25/25 μm), Inspection Technology (Automated Optical Inspection, Direct Imaging, Automated Optical Shaping), Application, and Geography - Global Forecast to 2024

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Abstracts

“High adoption of SLP by leading OEMs to drive overall growth of substrate-like PCB market”

The substrate-like PCB market is expected to grow from USD 1.1 billion in 2018 to USD 2.6 billion by 2024, at a compound annual growth rate (CAGR) of 15.6% during the forecast period. The substrate-like PCB market is driven by various factors, such as the high adoption of SLPs by leading OEMs, the surge in demand for smart consumer electronics and wearable devices, and impactful benefits of SLPs. However, higher setup costs associated with SLPs can hinder the growth of the market.

“Based on line/space, less than 25/25 μm line/space to witness highest CAGR during forecast period”

The line spacing of the copper track embedded into the PCB is important as it is directly related to the size of the PCB and eventually the size of the product. As miniaturization of the product has become an important factor in applications such as consumer electronics, medical, and computing and communications, the line spacing is expected to decrease further. With modified semi-additive method (mSAP), manufacturing smaller size PCBs can be achieved by reducing the track width, which ultimately makes it possible to have more number of electrical connections on the same area of the PCB. The PCB industry is striving continuously to improve the mSAP process capability and achieve unprecedented densities, which, in turn, helps fabricators to offer SLPs with

line/space of less than 25/25 μm .

“Based on inspection technologies, automated optical shaping to grow at highest CAGR during forecast period”

AOS technology helps to remove excess copper and complete PCB tracks (patterns) on the SLP board where copper is missing. With this technology, PCB manufacturers can benefit from common problems observed on PCB boards such as short tracks and open tracks as this technology has the potential to remove the short tracks and connect the open tracks automatically. Due to the additional benefits of AOS as compared to other inspection technologies, it is expected that AOS will grow at the highest CAGR during the forecast period.

“APAC to record highest growth rate during forecast period”

APAC is an emerging market for substrate-like PCBs. APAC has become a global focal point for large investments and business expansion opportunities. More than 50% of the global mobile subscribers live in APAC—mostly in China and India. There has been a paradigm shift of users from 3G to 4G technology in this region. Key factors that drive the SLP market growth in APAC include the increasing adoption of smartphones, a growing number of internet users, rising demand for connectivity solutions, expansion of telecommunications infrastructure, and expanding bandwidth-intensive applications in the region. As most of the smartphone providers are from the APAC region, it is expected that there would be a major demand for SLP in the APAC region during the forecast period. Taiwan has become one of the center places for the development of SLP technology.

In-depth interviews were conducted with chief executive officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the substrate-like PCB marketplace.

By Company Type: Tier 1 = 35%, Tier 2 = 45%, and Tier 3 = 20%

By Designation: C-Level Executives = 35%, Directors = 25%, and Others = 40%

By Region: North America = 30%, Europe = 20%, APAC = 45%, RoW = 5%

The substrate-like PCB market comprises major players, namely, AT & S (Austria); TTM

Technologies (US); Samsung Electro-Mechanics (South Korea); Korea Circuit (South Korea); Kinsus Interconnect Technology (Taiwan); Zhen Ding Technology (Taiwan); Unimicron (Taiwan); Compeq (Taiwan); Ibiden (Japan); Daeduck (South Korea); ISU Petasys (South Korea); Tripod Technology Corporation (Taiwan); and LG Innotek (South Korea).

The study includes an in-depth competitive analysis of these key players in the substrate-like PCB market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

The report defines, describes, and forecasts the substrate-like PCB market based on line/space, inspection technologies, application, and geography. It provides detailed information regarding the major factors (drivers, restraints, opportunities, and challenges) influencing the growth of the substrate-like PCB market. It also analyzes the competitive developments such as joint ventures, collaborations, agreements, contracts, partnerships, mergers and acquisitions, and product launches carried out by the key players to grow in the market.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall substrate-like PCB market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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