China FPC Industry Report, 2006-2007

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Being more flexible, much lighter and thinner than Rigid Printed Circuit (RPC), Flexible Printed Circuit (FPC) is usually applied to the products like cell phone, laptop, display screen, consumer electronics, and contactable panel and IC integration, etc.

Texturally, RPC is a product that presses the FCCL and PI together by adhesive. And it can be attached with some accessories such as reinforced board or linker to expand business scope or provide clients with all-round services. Therefore, the RPC manufacturing flow starts with the purchase of raw materials like CCL and FCCL, and then ends with assembly.

In Oct 2006, the global shipment of FPC increased by 26.4% over the same period of 2005, while its global order quantity decreased by 6.5% compared to 2005. Until the end of Oct 2006, the global shipment of FPC rose 8.3% over the year earlier, while its global order quantity dropped 6.5% from last year. From the view of growth of RPC and FPC during Jan-Oct 2006, FPC growth experienced a dramatic decrease in Feb-Jul but maintained a rate of around 25% in Aug-Oct. However, correspondingly, RPC market keeps more steadily.

In 2005, the global PCB market scale achieved approximately USD 42 billion, among which, Japan accounted for USD 11.3 billion, still ranking first in the world. China PCB industry has been keeping a high-speed growth with its production value of USD 6 billion in 2003, USD 8.15 billion in 2004 and as high as USD 10.83 billion in 2005 only next to Japan. And the PCB production value in China is expected to exceed USD 12 billion in the year of 2006. There are about 2800 PCB enterprises in the world and around 1200 PCB enterprises in mainland China. Most of the world well-known PCB manufacturers have established facilities and are making expansions. It is estimated that China will still be the important bases for investment and transfer of the PCB manufacturers. In 2005, the PCB output of China broke 11 million m2, half of which was from multilayer board. The PCB product structure of China is developing rapidly toward such high-grade products as high-multilayer products and HDI. The total import & export value of PCB products in China reached USD 6 billion in 2003, USD 8.9 billion in 2004 and rocketed to USD 11.9 billion with a year-on-year growth of 34% in 2005.

Driven by the strong demands from 3G handset, smart phone, digital camera and display screen, global FPC can keep a growth rate of 8%-10% during 2006-2008. As for the FPC for handset, it will develop towards polarization. One will be inclined to multilayer FPC or rigid-flex PCB design, which aims to realize max data volume and upgrade the assembly quality; another is single-/double-layer FPC at a lower cost which is mainly applied to low-grade cell phone. Therefore, it will be helpful for upgrading the market of single-/double-layer FPC if handset manufacturers can effectively enter into market with medium-and-low-end handsets.

FPC industry has seen three development orientations:

Firstly is FPC that uses the material of 2L FCCL. Price is now the obstacle over the large-scale development of 2L FCCL as 2L FCCL is short of supply and manufacturers enjoy a high gross profit. But once the price war starts up, the shipment will be further expanded, so the price will rapidly slip. Some believe 3L FCCL will still take the mainstream though, yet, ResearchInChina thinks the market always develops far beyond what we can be expected.

Secondly is rigid-flex PCB. Due to the emergence of slip and twisty cell-phones, rigid-flex PCB has become the favors of Korean manufacturers. But most of domestic FPC enterprises are not experienced in RPC, so they have to challenge the technology in rigid-flex PCB.

Thirdly comes to the high-density FPC. As the 3G era is coming, the traditional-density FPC is far enough to use, so the wiring density for cell phone has to be further enhanced, which is also why most of 3G cell phones are still the straight ones.

This report first analyzes the status quo of PCB industry, and then the development history and market scale of FPC industry across the world and China's mainland & Taiwan. Following are some information about raw materials of FPC like PI and FCCL and related manufacturers. Besides, it also probes into the development trends regarding FPC manufacturers' competition status, latest news, regional distribution, product structure, output & production value, competitive strategies, development orientation and key raw materials supply, etc.

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