

Global and China Advanced Rigid PCB Industry Report, 2014-2015

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Abstracts

Global and China Rigid PCB Industry Report, 2014-2015 is primarily concerned about the followings:

1. Overview of global rigid PCB industry
2. Analysis of PCB downstream market
3. PCB development trend
4. Analysis of photoelectricity, laptop computer, auto and memory PCB industry
5. Ranking of PCB industry
6. 33 PCB Companies

PCB industry can be divided into three categories: rigid PCB, FPCB and substrate. And FPCB and substrate are the emerging industries, for there was only rigid PCB in the early stage. Despite the rapid growth in FPCB and substrate in recent years, rigid PCB has still occupied over 50% of the total industry. And quite a few rigid PCB vendors have gained profits that are not less than that of FPCB and substrate.

PCB industry is fairly mature, with the growth rate generally not more than 6%. And the output value of rigid PCB vendors has long been declining. The year 2012 witnessed a hard time of rigid PCB vendors at a time when smartphone and tablet PC market showed an unexpectedly rapid growth, which sent rigid PCB vendors into fierce price war, thus leading to a drop in profit and revenue. Meanwhile, large PCB companies believed that the traditional rigid PCB had not enough growth potential so that they were beginning to shift their focus to FPCB and substrate. In 2013, almost all the rigid PCB vendors outside mainland China turned around, and even better in 2014 with a higher profit.

In the future, large PCB vendors will concentrate on FPCB and substrate while maintain the status quo for rigid PCB. The major vendors to expand substrate include Unimicron, SEMCO, LG INNOTEK, AT&S, DAEDUCK, Shennan Circuit, SIMMTECH, and the companies, such as Zhen Ding Technology, Young Pong and DAEDUCK GDS will go to the field of FPCB. However, only Ibiden will be committed to development of rigid PCB. In addition, some large vendors go directly into EMS field, such as Tripod Technology and Hannstar Board, the largest laptop PCB giant. This would make the future demand and supply of traditional rigid PCB more balanced, but the high-end Any layer and HDI will be obviously in short supply.

In 2014, the accelerated recovery of rigid PCB industry arises out of another reason—the retreat of Japanese PCB companies.

In November 2013, Japan's Panasonic announced its decision to sharply reduce its PCB capacity globally, with 90% of its global capacity closed down by Q1 2015. In 2013, Panasonic's revenue from PCB business, mainly involved the R&D of ALIVH (Any Layer Interstitial Via Hole) applied in smartphones, was approximately USD310 million. In March 2013, Panasonic was reported to cut down its PCB capacity in Taiwan and Vietnam. In mid-March 2012, the company established a factory in Dayuan Township of Taoyuan County, a move that was designed to compete for HTC orders. In 2013, however, the shipments of HTC presented a sharp decline, thus resulting in fairly low capacity utilization, hence the determination to withdraw the market.

Still, the Japanese automobile PCB vendor CMK also followed suit and announced in January 2014 that it would shut down its PCB factory YAMANASHI SANKO on April 30, 2014. Meanwhile, it would suspend the production of mobile phone multilayer PCB ALIVH products. Currently, it is Austria's AT&S alone that uses ALIVH technology.

Japanese PCB also showed the tendency of mergers and acquisitions, with NEC-TOPPAN acquired by Kyocera in August 2013. In future, Fujitsu will also be very likely to sell its PCB business. And Daisho Denshi may merge with PCB business of Hitachi Chemical.

Contents

1. OVERVIEW OF PCB INDUSTRY

- 1.1 Output Value of Global PCB Industry
- 1.2 Recent Developments and Future Trends of PCB Industry
- 1.3 Taiwan PCB Industry
- 1.4 Chinese Mainland PCB Industry
 - 1.4.1 Industrial Scale
 - 1.4.2 Policy on PCB
- 1.5 Ranking of Chinese Mainland PCB Vendors
- 1.6 European PCB Industry
- 1.7 North American PCB Industry

2. PCB DOWNSTREAM MARKET

- 2.1 Mobile Phone
 - 2.1.1 Global Mobile Phone Market Size
 - 2.1.2 Market Share of Mobile Phone by Brand
 - 2.1.3 Smartphone Market and Industry
 - 2.1.4 China Mobile Phone Market
 - 2.1.5 China Mobile Phone Industry
- 2.2 PC Market
 - 2.2.1 Notebook Computer Industry
 - 2.2.2 Notebook Computer Foundry
 - 2.2.3 Tablet PC Industry
 - 2.2.4 China Mobile PC Industry

3. ANALYSIS OF PCB INDUSTRY

- 3.1 PCB Technology Trend
 - 3.1.1 Ranking of PCB Companies for Mobile Phone
 - 3.1.2 Supporting Relationship of Mobile Phone PCB
- 3.2 Memory Module PCB
- 3.3 Photonics PCB
- 3.4 PCB for Automotive Electronics
- 3.5 PCB for Notebook Computer
- 3.6 Ranking of Global PCB Companies

4. MAJOR PCB COMPANIES

- 4.1 Unimicron
- 4.2 Compeq
- 4.3 Hannstar Board PCB
- 4.4 Gold Circuit Electronics
- 4.5 Tripod Technology
- 4.6 Meiko
- 4.7 CMK
 - 4.7.1 WUXI CMK
 - 4.7.2 CMK GBM
 - 4.7.3 CMKC DONGGUAN
- 4.8 IBIDEN
- 4.9 Daeduck Electronics
- 4.10 TTM
- 4.11 Unitech PCB
- 4.12 AT&S
- 4.13 Kingboard
 - 4.13.1 Elec&Eltek
 - 4.13.2 Tech-Wise Circuit
 - 4.13.3 Express Electronics
- 4.14 SIMMTECH
- 4.15 T.P.T
- 4.16 Ellington Electronics
- 4.17 Chinpoon Industrial
- 4.18 LG INNOTEK
- 4.19 SEMCO
- 4.20 Founder PCB
- 4.21 Gul Technologies
- 4.22 Dynamic PCB
- 4.23 Viasystems
- 4.24 Nanya PCB
- 4.25 Shennan Circuit
- 4.26 WUS Electronics
- 4.27 Guangdong Goworld
- 4.28 ZDT
- 4.29 Multek
- 4.30 Kinsus
- 4.31 Shinko

4.32 ISU PETASYS

4.33 KYOCERA Circuit Solutions

Selected Charts

SELECTED CHARTS

Output Value of PCB Industry, 2001-2015
Global PCB Output Value, 1980-2001
PCB Industry Chain
Revenue of PCB Industry by Technology, 2009-2015E
Global PCB Output Value by Layer, 2013
Revenue of Global PCB Industry by Region, 2013 & 2017E
Revenue of Global PCB Industry by Region, 2012-2014
Revenue of PCB Industry in Taiwan by Product, 2010-2013
Revenue of PCB Industry in Taiwan, Jan.2001-Apr.2014
Investment Structure of PCB Companies in Mainland China, 2010-2011
Output Value of PCB Industry in Mainland China by Technology, 2011-2013
Ranking of Chinese Mainland PCB Vendors by Revenue, 2013
European PCB Production by End Market, 2013
Revenue of European PCB Vendors by Country, 2013
Revenue of European PCB Vendors by Country, 2000-2013
Quarterly Revenue of Major European PCB Vendors, 2009-2013
Output Value Growth of European PCB Vendors, 2005-2017E
TOP 50 PCB Vendors in Europe, 2013
Quarterly Revenue of Major North American PCB Vendors, Q1 2008-Q12014
Output Value Growth of North American PCB Vendors, 2005-2017E
Worldwide Mobile Phone Sales to End Users by Vendor in 2013
Smartphone Shipment of Major Chinese Mobile Phone Vendors, 2011-2013
Worldwide Smartphone Sales to End Users by Vendor, 2013
Worldwide Smartphone Sales to End Users by Operating System, 2013
Monthly Shipment of Mobile Phone in China, Jan.2013-May 2014
Market Share of Major Chinese Mobile Phone Vendors, 2014Q1
China's Monthly Mobile Phone Output, Feb-Dec 2013
China's Monthly Mobile Phone Export Value, 2013
Monthly Revenue and Profit of China Communication Terminal Equipment Manufacturing Industry, Feb-Dec 2013
Monthly Investment of China Communication Terminal Equipment Manufacturing Industry, Feb-Dec 2013
Global PC Shipment, 2008-2015
Global PC Shipment, 1999-2013
Global PC Shipment by Region, 2014 Q1

Global PC Shipment by Brand, 2014 Q1
Notebook Computer Shipment, 2008-2015E
Shipment of Major Notebook Computer ODM Vendors, 2010-2013
Market Share of Major Notebook Computer Foundries, 2006 vs.2008
Supporting Relationship and Shipment Ratio between Notebook Computer Brands and OEMs, 2010
Supporting Relationship and Shipment Ratio between Notebook Computer Brands and OEMs, 2011
Supporting Relationship and Shipment Ratio between Notebook Computer Brands and OEMs, 2012-2013
Global Tablet PC Shipment, 2011-2016E
Market Share of Major Tablet PC Brands, 2013
Shipment of Major Tablet PC Vendors, 2012-2013
Output of Notebook Computer (including Tablet PC) in China, 2004-2012
Output of Notebook Computer (including Tablet PC) in China by Region, 2010-2012
Ranking of HDI Vendors by Revenue, 2012-2013
Supply Structure of PCB for NOKIA Mobile Phone, 2010-2013
Supply Structure of PCB for SAMSUNG Mobile Phone, 2010-2013
Supply Structure of PCB for LG Mobile Phone, 2012
Supply Structure of PCB for ZTE Mobile Phone, 2010-2013
Supply Structure of PCB for RIM Mobile Phone, 2010-2011
Supply Structure of PCB for APPLE, 2010-2013
Ranking of DRAM Vendors by Revenue, 2014Q1
Market Share of DRAM Vendors Worldwide, 2014Q1
Market Share of NAND Vendors Worldwide, 2014Q1
Market Share of Memory Module PCB Vendors Worldwide, 2007-2013
Market Share of Major PV Panel Businesses in China, 2006/2010/2011/2012
Market Share of Automotive Electronic PCB Businesses, 2010-2013
Market Share of Major Notebook PCB Vendors by Shipment, 2011-2012
Top 20 PCB Vendors Worldwide by Revenue, 2012-2013
Top 37 Rigid PCB Vendors Worldwide by Revenue, 2012-2014
Gross Margin of Major PCB Vendors, 2012-2014
Gross Margin of Top 25 PCB Vendors, 2012-2014
Unimicron's M & A
Financial Data of Unimicron's Subsidiaries in Mainland China, 2013
Revenue and Gross Margin of Compeq, 2006-2014
Revenue and Operating Margin of Compeq, 2009-2014
Monthly Revenue and Growth Rate of Compeq, May 2012-May 2014
Financial Data of Major Subsidiaries under Compeq, 2009-2013

Revenue and Gross Margin of Hannstar Board PCB, 2006-2014
Revenue and Operating Margin of Hannstar Board PCB, 2009-2014
Monthly Revenue and Growth Rate of Hannstar Board PCB, May 2012-May 2014
Revenue of Hannstar Board PCB by Application, 2009-2012
Revenue of Hannstar Board PCB by Layer, 2009-2012
Financial Data of Major Subsidiaries under Hannstar Board PCB, 20112
Financial Data of Major Subsidiaries under Hannstar Board PCB, 2013
Revenue and Gross Margin of Gold Circuit Electronics, 2005-2014
Revenue and Operating Margin of Gold Circuit Electronics, 2009-2014
Monthly Revenue and Growth Rate of Gold Circuit Electronics, May 2012-May 2014
Revenue of Gold Circuit Electronics by Product, 2010-2012
Revenue and Gross Margin of Tripod Technology, 2006-2014
Revenue and Operating Margin of Tripod Technology, 2012-2014
Revenue of Tripod Technology by Application, 2013
Revenue of Tripod Technology by Layer, 2013
Monthly Revenue and Growth Rate of Tripod Technology, May 2012-May 2014
Capacity of Tripod Technology, 2006-2011 (Unit: 1,000 m2)
Financial Data of Major Subsidiaries under Tripod Technology in Mainland China, 2013
Revenue and Operating Margin of Meiko, FY2006-FY2015
Operating Income Analysis of Meiko, FY2014
Revenue and Operating Margin of Chinese Mainland Subsidiaries under Meiko, FY2009-FY2014
Revenue of Meiko by Application, FY2013-FY2015
Revenue of Meiko by Layer, FY2013-FY2015
Revenue and Operating Margin of CMK, FY2005-FY2015
Revenue of CMK by Application, FY2007-FY2014
Revenue of CMK by Layer, FY2007-FY2014
Revenue of CMK by Region, FY2007-FY2014
Revenue and Output of WUXI CMK, 2003-2010
Revenue and Operating Margin of TTM, 2005-2014
Revenue of TTM by Region, 2011-2013
Revenue of TTM by Technology, 2013
Revenue of TTM by Application, 2008-2013
Global Presence of TTM Plants
Revenue and Gross Margin of Unitech PCB, 2006-2014
Revenue and Operating Margin of Unitech PCB, 2009-2014
Monthly Revenue and Growth Rate of Unitech PCB, May 2012-May 2014
Technology Roadmap of Rigid PCB
Technology Roadmap of Rigid-Flex PCB

Financial Data of Shanghai Unitech Electronics Co., Ltd, 2012-2013
Revenue and Profit before Taxation Margin of Kingboard, 2009-2013
Balance Sheet of Kingboard, 2009-2013
Revenue of Kingboard by Business, 2008-2013
Revenue and Operating Margin of Elec & Eltek, 2005-2013
Balance Sheet of Elec & Eltek, 2009-2013
Revenue of Elec & Eltek by Region, 2006-2013
Revenue of Elec & Eltek by Layer, 2006-2013
Capacity of Plants under Elec & Eltek
Technology Capability of Elec & Eltek
Revenue from Dongguan Plant of Express Electronics, 2009-2013
Capacity of Dongguan Plant of Express Electronics
Revenue from Suzhou Plant of Express Electronics, 2008-2013
Capacity of Suzhou Plant of Express Electronics
Capacity of Qingyuan Plant of Express Electronics
SIMMTECH's Balance Sheet, 2009-2013
Revenue and Gross Margin of T.P.T, 2005-2014
Revenue and Operating Margin of T.P.T, 2009-2014
Monthly Revenue and Growth Rate of T.P.T, May 2012-May 2014
Client Structure of T.P.T, 2012
Revenue of T.P.T by Application, 2012
Financial Data of Major Subsidiaries under T.P.T in Mainland China
Revenue and Gross Margin of Ellington Electronics, 2009-2014
Revenue of Ellington Electronics by Layer, 2009-2013
Revenue of Ellington Electronics by Application, 2009-2012H1
Revenue of Ellington Electronics by Region, 2009-2012H1 141
Revenue Structure by Client of Ellington Electronics, 2007-2012
Revenue and Gross Margin of ChinPoon Industrial, 2005-2014
Revenue and Operating Margin of ChinPoon Industrial, 2009-2014
Monthly Revenue and Growth Rate of Chin-Poon Industrial, May 2012-May 2014
Revenue and Operating Margin of Founder PCB, 2007-2013
Financial Data of Founder PCB's Subsidiaries, 2013
Downstream Application of Founder PCB, 2010-2012
HDI Technology Capability of Founder PCB
Revenue and Operating Income of Gul Technologies, 2005-2013
Revenue and Gross Margin of Dynamic PCB, 2006-2014
Revenue and Operating Margin of Dynamic PCB, 2009-2014
Monthly Revenue and Growth Rate of Dynamic PCB, May 2012-May 2014
Capacity of Dynamic PCB, 2009-2012

Revenue and Operating Margin of Viasystems, 2006-2014
Revenue of Viasystems by Business, 2008-2013
Global Distribution of Viasystems
Revenue of Viasystems by Application, 2008-2013
Revenue of Viasystems, 2010-2012
Revenue of DDI by End Market and Region
Major Clients of DDI
Technology Capabilities of Shennan Circuit
Revenue and Operating Income of WUS Electronics, 2007-2014
Revenue of WUS Electronics by Layer, 2010-2013
Revenue of Wus Electronics by Application, 2007-2013
Gross Margin of Wus Electronics by Application, 2012-2013
Major Clients of WUS Electronics, 2010/2011/2013
Revenue and Operating Margin of Guangdong Goworld, 2005-2014
Revenue of Guangdong Goworld by Business, 2007-2013
Revenue and Operating Margin of ZDT, 2008-2014
Revenue and Gross Margin of ZDT, 2009-2014
Monthly Revenue and Growth Rate of ZDT, May 2012-May 2014
Financial Data of Major Subsidiaries under ZDT in Mainland China, 2012
Financial Data of Major Subsidiaries under ZDT in Mainland China, 2013
Technology Roadmap of Multek ELIC, 2011-2013
Technology Roadmap of Rigid-Flex PCB of Multek, 2011-2013
Technology Roadmap of Multek Microvias, 2011-2013
Revenue and Operating Margin of ISU PETASYS, 2008-2014
Revenue of ISU PETASYS by Technology, 2012-2014

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