

Global and China FPCB Industry Report, 2015

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Abstracts

Global and China FPCB Industry Report, 2015 covers the following contents:

1. Overview of FPCB
2. Downstream markets of FPCB
3. FPCB industry
4. 31 companies in FPCB industry chain

Global FPCB market size was up to USD12.952 billion in 2014 (up 14.4% from a year ago), grew by 3.4% YoY to about USD13.386 billion in 2015, and is expected to arrive at USD13.68 billion in 2016 at a slower annual growth rate of 2.2%, largely due to:

Depressed downstream markets: mobile phone market took a downturn with shipment growth of smartphone below 5%; shipments of tablet PC contracted significantly; shipments of laptop computer remained flat; shipments of HDD dropped markedly;

A sharp depreciation of the Japanese yen;

Decline in prices of upstream raw materials caused by deflation.

There is still growth space for FPCB. First, electronics now pursue for ultra-thinness, and FPCB is the best solution, as it is only 1/10 of the thickness of RPCB and makes 3D wiring a reality. Line width will be smaller than 40nm, so the unit price of FPCB is expected to rise. Second, the surface of more and more FPCB is mounted with SMD devices, which is also conducive to a rise in the unit price of FPCB.

FPCB makes up about 10% of automotive PCB market in 2015, about USD528 million, and is expected to reach 16% in 2019 or around USD1.123 billion. Automotive switches (wiper, lighting, turn signal, cruise control) and information center display, head up

display, and instrument cluster all need FPCB. Moreover, as the automotive display becomes increasingly larger, the demand for FPCB will swell up.

For cell voltage monitoring in xEV field, the larger the number of cell is, the more FPCB will be needed. For transmission control units in automotive Powertrain field, the more the gears are, the larger the area of FPCB will be. For automotive lighting, except for LED head-lamp which may not need FPCB, others like daytime running light, turn signal indicator, parking lights, signature lighting, and rear lights all need FPCB. In addition, the automotive LED lighting market has been growing at a rapid pace.

A large amount of FPCB is needed for automotive sensors, such as the ones for camera module, pressure sensors for air conditioning systems, pressure sensors for brake systems and transmissions, keyless entry sensor, and electronic door handle. As ADAS becomes more universal, the number of sensors will explode, causing an exponential growth in the demand for FPCB.

From the perspective of the industry, Japanese and Taiwanese vendors achieve powerful competitiveness via currency depreciation. And not only that, Japanese companies also enjoy cutting-edge technologies, while Taiwanese players win more and more orders by relying on their good relationship with Apple. By contrast, the mainland Chinese companies and South Korean ones obviously lack competitiveness, as South Korean won doesn't depreciate as violent as Japanese yen. Automotive FPCB industry is virtually dominated by Japanese companies, and the thresholds are much higher.

Contents

1 OVERVIEW OF FPCB

- 1.1 Profile
- 1.2 Single-sided FPCB
- 1.3 Double-sided FPCB, “Single-sided FPCB + Single-sided FPCB” and Multilayer FPCB
- 1.4 FPCB Manufacturing Process

2 FPCB MARKET

- 2.1 FPCB Market Size
- 2.2 HDD Market
- 2.3 Global Mobile Phone Market
- 2.4 Global Smartphone Market and Industry
- 2.5 Overview of Chinese Mobile Phone Market
- 2.6 Laptop Computer Market
- 2.7 Tablet PC Market
- 2.8 Touch Screen Industry Chain
- 2.9 Touch Screen Industrial Scale
- 2.10 Touch Screen Development Trend
 - 2.10.1 Medium-sized Touch Screen
 - 2.10.2 Laptop Computer Touch Screen
- 2.11 Automotive FPCB Market Size
- 2.12 Automotive FPCB Application Case

3 FPCB INDUSTRY

- 3.1 FPCB Industry Chain
- 3.2 Business Models of FPCB Companies
- 3.3 Geographical Distribution of FPCB Industry
- 3.4 FPCB Supply
- 3.5 Mobile Phone FPCB Supply Relationship
- 3.6 Ranking of FPCB Companies

4 FPCB COMPANIES

- 4.1 Fujikura

- 4.1.1 Fujikura Electronics Shanghai
- 4.1.2 Fujikura Electronics Wuxi
- 4.2 Nippon Mektron
 - 4.2.1 Mektec Manufacturing Corporation (Zhuhai)
 - 4.2.2 Mektec Manufacturing Corporation (Suzhou)
- 4.3 Nitto Denko
- 4.4 Dexerials
- 4.5 M-Flex
- 4.6 Flexium
- 4.7 Career
- 4.8 Sunflex
- 4.9 AKM
- 4.10 Xiamen Hongxin Electron-Tech Co, Ltd.
- 4.11 Parlex
- 4.12 SI Flex
- 4.13 Sumitomo Electric Industries
- 4.14 Daeduck GDS
- 4.15 Interflex
- 4.16 Shenzhen JCD Circuit Technology Co., Ltd.
- 4.17 BHflex
- 4.18 Newflex
- 4.19 Flexcom
- 4.20 MFS
- 4.21 Ichia
- 4.22 ZDT
- 4.23 Kinwong

5. FCCL COMPANIES

- 5.1 Taiflex
- 5.2 ThinFlex
- 5.3 Nippon Steel Chemical
- 5.4 Arisawa
- 5.5 Microcosm
- 5.6 AEM
- 5.7 Taimide
- 5.8 INNOX

Selected Charts

SELECTED CHARTS

Structure of Single-sided FPCB
Structure of Double-sided FPCB
Block Diagram of “Single-sided FPCB + Single-sided FPCB”
Block Diagram of Double-sided FPCB
Block Diagram of COF
Schematic Diagram of Rigid and Flex PCB
FPCB Manufacturing Process
Work Concept of Exposure Machine
Imaging
Etching
Film Stripping
Hot Pressing
FPCB Market Size, 2007-2016
FPCB Market by Application, 2013 & 2017E
Quarterly HDD Shipment, Q4 2012-Q3 2015
HDD Shipment, 2009-2016
Market Share of Global Major HDD Companies, 2015
Global Mobile Phone Shipment, 2007-2016
Worldwide Mobile Phone Sales to End Users by Vendor, 2012-2013
Shipment of Global Top 10 Mobile Phone Companies, 2013-2015
Worldwide Smartphone Sales to End Users by Vendor, 2012-2015
Worldwide Smartphone Sales to End Users by Operating System, 2012-2015
Monthly Shipment of Chinese Mobile Phone Market, Oct.2014-Oct.2015
Market Share of Major Companies in Chinese Smartphone Market, 2014
Market Share of Major Companies in Chinese Smartphone Market, 2014-2015
Laptop Computer Shipment, 2008-2015
Shipment of Global Major Laptop Computer ODM Companies, 2010-2014
Global Tablet PC Shipment, 2011-2016E
Shipment of Top Five Tablet PC Vendors, Q4 2014
Shipment, Market Share and Growth of Top Five Tablet PC Vendors, 2014
Touch Screen Industry Chain
Touch Industry Supply Chain and Eco-system
Global Touch Screen Market Size, 2010-2016E
Global Touch Screen Market Size (Shipment), 2010-2016E
Development Trends of Global Smartphone Touch Technology, 2013-2017E

Medium-sized Touch Screen by Technology, 2011-2015
Laptop Touch Screen Shipment by Technology, 2012-2016E
Global Automotive PCB Market Size, 2011-2019E
Automotive PCB Market by Position, 2015&2020E
Global Major FPCB Players
Taiwan's FPCB Industry Chain
Revenue of Global FPCB Industry by Region, 2009-2015E
Revenue of Global FPCB Industry by Region, 2010-2011
FPCB Supply Relationship in Hard Disk Field
FPCB Supply Relationship in CD Driver Field
FPCB Supply Relationship in Mobile Phone Field
Major FPCB Suppliers of Samsung by Value, 2011-2013
Major FPCB Suppliers of Apple by Value, 2011-2014
Ranking of Japanese FPC Companies by Revenue, 2010-2015
Ranking of South Korean FPC Companies by Revenue, 2012-2015
Ranking of South Korean FPC Companies by Operating Margin, 2009-2015
Ranking of Taiwanese FPC Companies by Revenue, 2010-2015
Ranking of Taiwanese FPC Companies by Operating Margin, 2009-2015
Ranking of Major Global FPCB Companies by Revenue, 2009-2015
Bases of Fujikura in Thailand
Revenue and Operating Profit of Fujikura, FY2006-FY2016
Revenue of Fujikura by Division, FY2008-FY2013
Revenue of Fujikura by Product, FY2014-FY2016
Operating Profit of Fujikura by Business, FY2013-FY2016
Revenue of Fujikura's FPC Segment, FY2008-FY2016
Revenue and Operating Margin of NOK, FY2001-FY2016
Organizational Structure of Mektron
Revenue of NOK by Product, FY2006-FY2016
Operating Profit of NOK by Product, FY2013-FY2016
Revenue of NOK by Region, FY2010-FY2016
Revenue of Mektron's FPC Division by Region, FY2010-FY2016
Global Presence of Mektron
Revenue and Operating Profit of Mekttec Manufacturing Corporation (Zhuhai), 2004-2014
Revenue and Operating Margin of Nitto Denko, FY2006-FY2016
Revenue of Nitto Denko by Business, FY2013-FY2015
Operating Profit of Nitto Denko by Business, FY2013-FY2015
Financial Data of Dexerials Suzhou, 2004-2010
Revenue and Operating Profit of M-Flex, FY2004-FY2015

Revenue of M-Flex by Region, FY2010-FY2014
Revenue of M-Flex by Country, FY2012-FY2014
Operating Profit of M-Flex by Region, FY2006-FY2013
Customer Structure of M-Flex, FY2006-FY2015
Revenue of M-Flex by Application, Q1 2011-Q2 2015
Output and Capacity Utilization of Flexium, 2009-2014
Revenue and Gross Margin of Flexium, 2005-2015
Revenue and Operating Margin of Flexium, 2005-2015
Monthly Revenue and Annual Growth Rate of Flexium, Oct.2013-Oct.2015
Revenue of Flexium by Application, 2013-2014
Revenue of Flexium by Application, 2015
FPC Layers of Flexium, 2009-2013
Cash Flow of Flexium, Q3 2015
Associated Companies of Career
Organizational Structure of Career
Divisions of Career
Revenue and Operating Margin of Career, 2006-2015
Revenue and Annual Growth Rate of Career, Oct.2013-Oct.2015
Balance Sheet of Career, Q3 2014
Revenue of Career by Client, 2014
Capacity of Career by Product
Major Business of Career by Plant
Financial Data of Three Mainland Chinese Subsidiaries of Career, 2014
Revenue and Operating Margin of Sunflex, 2009-2015
Monthly Revenue and Growth Rate of Sunflex, Oct.2013-Oct.2015
Revenue and Gross Margin of AKM, 2006-2015
Revenue and Operating Profit of AKM, 2006-2015
Revenue of AKM by Business, 2009-2015
Major Clients of AKM
Financial Indicators of Xiamen Hongxin Electron-Tech, 2011-2014
Capacity and Output of Xiamen Hongxin Electron-Tech, 2011-2014H1
Sales Volume and ASP of Xiamen Hongxin Electron-Tech, 2011-2014H1
Client Distribution of Xiamen Hongxin Electron-Tech, 2013-2014H1
Revenue and Operating Profit of SI Flex, 2007-2015
Organizational Structure of SI Flex
Revenue and Operating Margin of Sumitomo Electric Industries, FY2008-FY2016
Revenue of Sumitomo Electric Industries by Business, FY2009-FY2016
Operating Profit of Sumitomo Electric Industries by Business, FY2011-FY2015
Revenue of FPC Division of Sumitomo Electric Industries, FY2008-FY2015

Revenue and Operating Margin of Daeduck GDS, 2008-2015
Revenue of Daeduck GDS by Business, 2010-2015
Revenue and Operating Margin of Interflex, 2005-2015
Quarterly Revenue and Operating Margin of Interflex, Q1 2012-Q4 2015
Quarterly Revenue of Interflex by Product, Q1 2009-Q1 2014
Revenue of Interflex by Customer, 2009-2015
Capacity of Interflex, 2009-2012
Organizational Structure of Shenzhen JCD Circuit Technology
Revenue and Operating Profit of BHflex, 2005-2015
Organizational Structure of BHflex
Revenue of BHflex by Application, 2013-2015
Revenue of BHflex by Client, 2013-2016
Revenue and Operating Profit of Newflex, 2005-2015
Revenue and Operating Margin of Flexcom, 2006-2015
Revenue of Flexcom by Technology, 2013-2016
Revenue and Profit Attributable to Shareholders of MFS, 2006-2014
Revenue of MFS by Region, 2008-2011
Organizational Structure of Ichia
Revenue and Operating Margin of Ichia, 2006-2015
Monthly Revenue of Ichia, Oct.2013-Oct.2015
Quarterly Revenue of Ichia by Business, Q1 2014-Q3 2015
Quarterly Gross Margin of Ichia, Q1 2014-Q3 2015
Revenue of Ichia by Application, 2015
Holding Structure of ZDT
Revenue and Operating Margin of ZDT, 2008-2015
Revenue and Gross Margin of ZDT, 2008-2015
Monthly Revenue of ZDT, Oct.2013-Oct.2015
Global Footprint of ZDT
Number of Employees of ZDT, 2006-2014H1
Financial Statements of ZDT's Subsidiaries in Mainland China, 2014
Revenue and Operating Profit of Kinwong, 2011-2015
FPC Output and Capacity of Kinwong, 2011-2014
FPC Revenue and ASP of Kinwong, 2011-2014
Revenue of Kinwong by Application, 2011-2014
Revenue and Operating Margin of Taiflex, 2007-2015
Monthly Revenue and Annual Growth Rate of Taiflex, Oct.2013-Oct.2015
Revenue of Taiflex by Business, 2008-2015
FCCL Product Revenue Structure of Taiflex, 2009-2012
Balance Sheet of Taiflex, 2011-2014

Cash Flow of Taiflex, 2011-2014
Revenue and Operating Margin of ThinFlex, 2009-2015
Revenue and Annual Growth Rate of ThinFlex, Oct.2013-Oct.2015
Revenue and Operating Profit of Nippon Steel Chemical, FY2008-FY2015
Revenue Structure of Nippon Steel Chemical by Product, FY2006-FY2015
Revenue and Operating Margin of Arisawa, FY2006-FY2016
Revenue of Arisawa by Product, FY2006-FY2015
Revenue and Operating Margin of Microcosm, 2003-2014
Revenue and Annual Growth Rate of Microcosm, Oct.2013-Oct.2015
Revenue and Operating Margin of AEM, 2007-2015
Monthly Revenue and Growth Rate of AEM, Oct.2013-Oct.2015
Organizational Structure of AEM
Revenue of AEM by Product, 2011
Revenue and Operating Margin of Taimide, 2005-2015
Monthly Revenue and Growth Rate of Taimide, Oct.2013-Oct.2015
Market Share of Global Major PI Companies, 2011
Revenue and Operating Margin of INNOX, 2005-2015
Revenue of INNOX by Product, 2011-2015
Revenue of INNOX by Client, 2014

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