

Global and China Rigid PCB Industry Report, 2015

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Abstracts

Global and China Rigid PCB Industry Report, 2014-2015 highlights the followings:

1. PCB industry
2. PCB downstream market
3. Horizontal comparison of PCB companies
4. 35 typical PCB companies

2014 was a good year for majority of PCB companies, as output value of PCB industry touched USD59.6 billion, rising 3.7% against 2013, the fastest growth rate since 2011. Looking forward to 2015, a collapse in prices of commodities, especially in that of copper, will significantly reduce raw materials costs of PCB companies, thus further driving their profit margins.

In 2014, in key regions of PCB manufacturing, euro, NTD, and yen all depreciated sharply, while the won appreciated, dealing a heavy blow to South Korean PCB industry and cutting profit margins of the country's PCB companies, which all suffered declines in revenue and profit margins, no exception for Samsung's SEMCO, whose revenue from PCB business glided 2.4%, revenue from IC Carrier business dropped by 19%, and operating margin fell to below 1% from about 9%.

Taiwanese companies and European ones, benefiting from currency devaluation, saw a surge in profit margins, while Japanese peers didn't gain from yen depreciation, as more than half of their production bases are located in foreign countries, but still performed better than South Korean counterparts.

HDI was still a main engine of growth in rigid PCB field in 2014, and is expected to maintain the momentum in 2015. As mobile phone screens become larger, PCB for mobile phone has to react accordingly. To ensure light weight and thinness of mobile

phone, the demand for more advanced Anylayer HDI increases tremendously. As Anylayer HDI technology is time- and -capacity consuming, combined with Panasonic's withdrawal from Anylayer HDI field, various PCB companies will expand Anylayer HDI capacity in 2015. In 2014, the company registered largest growth in revenue from HDI PCB business was Taiwanese Compeq, which boasts customers like Apple and Xiaomi with impressive performance, jumping by 28.3% to USD690 million, one step away from industry leader Unimicron.

Another spotlight in 2014 was PCB for server. With further penetration of internet economy, the coming of big data era, and influx of large amounts of capital into network economy, the demand for server ushers in explosive growth. PCB for server requires high Tg and low Loss, with layer growing more higher, up to 28, driving continuous increase in unit price of PCB for server since 2009. The companies that specialize in PCB for server, such as Taiwanese WUS Printed Circuit and ACCL, accomplished good results, with WUS Printed Circuit's revenue ascending by 20% and ACCL's 27%.

Regarding rigid PCB, LED lighting stimulated demand for metal PCB with good heat elimination performance. Taiwanese T.P.T, GIA TZOONG, and mainland Chinese Shenzhen Kinwong Electronic, which are skilled in metal PCB, all enjoyed a decent level of growth. In addition, PCB for automobile also did a good performance.

The most sensational event in PCB industry in 2014 was the merger of TTM and Viasystems. The combined company is absolutely No. 1 manufacturer with total revenue approximating USD2.5 billion. TTM enjoys a strong position in cellular phone and networking/telecom, and Viasystems in automotive and industrial fields, showing a perfect complementation.

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