Global and China PCB Industry Report, 2010-2011

https://marketpublishers.com/r/G188FDD465DEN.html
Date: March 2011
Pages: 165
Price: US$ 2,500.00 (Single User License)
ID: G188FDD465DEN

Abstracts

Prices:
Hard Copy: **US$ 2,600.00**
PDF for Single User: **US$ 2,500.00**
PDF for Enterprisewide: **US$ 3,700.00**

This report only studies the rigid PCB sector.

PCB is the cornerstone of the electronics industry, and the circuit of all electronics requires PCB. PCB industry has been very mature, with limited growth rate or decline margin. In 2008 and 2009, the output value of PCB industry decreased due to the fierce price competition. In 2010, the electronics industry rebounded, but PCB industry only grew by 10.5%. In 2011, the growth rate of PCB industry is expected to be merely 5.1%.

The internal PCB of ordinary mobile phones employs the design of 1HDI+2 traditional boards +1HDI, with HDI as the outer layer and the traditional board as the inner layer.

Intermediate and high-end smart phones adopt the design of 2 +2 +2 and 3 +2 +3, with 4 layers and 6 layers of HDI used respectively. In addition, iPad1 uses 1HDI +8 boards (traditional) +1 HDI, with 2 layers of HDI. iPad2 renders 3 +4 +3, with 6 layers of HDI, namely Any-Layer HDI, which reduces the thickness to be 0.88 cm. The thickness of iPad1 is 1.34 cm.

New type of iPad is 1/3 thinner than old type,mainly because HDI develops from the original multi-layer board to Any-Layer, and Any-Layer has dense holes. Nevertheless, the hole diameter of Any-Layer must be done by laser drilling instead of machine drilling. In the future, iPhone 5 will be lighter and thinner like iPad 2.

In the world, there are four iPad 2 suppliers, including Tripod which is the exclusive supplier of HDI mainboard in Taiwan, TTM of the USA, IBIDEN and MEIKO of Japan.

All alternative suppliers are from Taiwan, including Nan Ya PCB Corporation, Gold Circuit Electronics, Compeq Manufacturing Co., Ltd. and Unimicron.

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