

Automotive PCB Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Vehicle Type (Passenger Car and Commercial Vehicle), By Propulsion Type (IC Engine and Electric), By Regional, Competition

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Abstracts

Global Automotive PCB Market has valued at USD 6.5 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.8%. The global Automotive PCB (Printed Circuit Board) market is experiencing robust growth, primarily driven by the escalating demand for advanced vehicles, including electric and hybrid cars, that heavily rely on PCBs. These PCBs are crucial for facilitating the seamless integration and functioning of various electronic components within vehicles, enabling enhanced performance, safety, and connectivity.

Key players in the market are actively focusing on innovations and advancements in PCB technology to meet the growing demand and support the development of complex electronics within vehicles. One such innovation is the high-density interconnect (HDI) technology, which enables the compact and efficient design of PCBs, allowing for the integration of more electronic components in a smaller space. This advancement plays a vital role in the development of modern vehicles that require sophisticated electronic systems.

Geographically, the Asia-Pacific region is leading the Automotive PCB market, with countries like China, Japan, and South Korea emerging as key contributors. These countries have well-established and advanced automobile sectors, driving the demand for PCBs in their domestic markets. Additionally, the presence of major automotive manufacturers and suppliers in the region further fuels the growth of the market.

However, Europe and North America are also showcasing significant growth potential in the Automotive PCB market. These regions are witnessing an increasing adoption of advanced automotive technologies, including electric and autonomous vehicles, leading to a higher demand for PCBs. The stringent regulations and standards regarding automotive safety and emissions in these regions also drive the need for advanced electronic systems in vehicles.

In conclusion, the Automotive PCB market is experiencing substantial growth worldwide, powered by the demand for advanced vehicles and the continuous innovations in PCB technology. The Asia-Pacific region remains at the forefront of this market, while Europe and North America are also poised for significant growth. The integration of advanced PCBs in vehicles plays a crucial role in shaping the future of automotive technology and driving the industry towards greater efficiency and sustainability.

Key Market Drivers

Electrification of Vehicles

One of the most influential drivers of the Automotive PCB Market is the ongoing electrification of vehicles. As governments worldwide push for stricter emissions regulations and environmental sustainability, automakers are investing heavily in electric vehicles (EVs). EVs rely on complex electronic systems to manage battery performance, power distribution, and charging. PCBs are essential for supporting these electronic components, making them a critical component in the EV revolution.

Autonomous Driving Technology

The development of autonomous driving technology is accelerating the adoption of advanced PCBs in vehicles. Autonomous vehicles rely on a multitude of sensors, cameras, radar, and lidar systems to perceive their surroundings and make real-time decisions. These sensors generate massive amounts of data that require sophisticated electronic control units (ECUs) and PCBs for processing and decision-making. As autonomous driving technology evolves, the demand for high-performance PCBs capable of handling the data-intensive requirements of self-driving cars continues to rise.

Increasing Complexity of Vehicle Electronics

Modern vehicles are equipped with an unprecedented level of electronic systems and features, ranging from advanced driver-assistance systems (ADAS) to infotainment and connectivity features. This complexity necessitates PCBs designed to support a wide array of functions. As consumer demand for advanced features continues to grow, automakers are integrating more electronic components into their vehicles, further fueling the demand for PCBs.

Consumer Demand for Connectivity and Infotainment

Today's consumers expect seamless connectivity and advanced infotainment options in their vehicles. PCBs play a pivotal role in delivering these features, including smartphone integration, touchscreen displays, voice recognition, and in-car Wi-Fi. The demand for PCBs tailored for connectivity and infotainment systems is driven by the desire for an enhanced in-car experience, leading to continuous innovation in this segment.

Regulatory Pressure for Emissions Reduction

Governments around the world are imposing stringent emissions regulations to combat climate change and reduce air pollution. To meet these regulatory standards, automakers are focusing on improving fuel efficiency and reducing emissions through electronic control systems. PCBs are instrumental in optimizing engine performance, managing fuel injection, and controlling emissions, making them indispensable for compliance with emissions standards.

Safety and Advanced Driver-Assistance Systems (ADAS)

The integration of advanced driver-assistance systems (ADAS) into vehicles is another significant driver for the Automotive PCB Market. ADAS features like adaptive cruise control, lane-keeping assist, and collision avoidance rely heavily on PCBs for sensor data interpretation and decision-making. As safety becomes an increasingly important consideration for consumers, automakers are incorporating more ADAS components into their vehicles, further boosting the demand for PCBs tailored for these functions.

Supply Chain and Manufacturing Efficiency

Automakers are continually seeking ways to enhance supply chain efficiency and reduce manufacturing costs. PCB manufacturing processes have evolved to meet these demands, with a focus on producing high-quality, cost-effective PCBs in large

quantities. Streamlined production and efficient supply chains are key drivers for the Automotive PCB Market, ensuring that PCBs are readily available to support the growing electronic content in vehicles.

Miniaturization and Advanced Materials

Advances in materials science and miniaturization techniques are influencing the design and manufacturing of PCBs. Smaller, lightweight PCBs with improved heat dissipation properties are becoming increasingly important, especially in electric and autonomous vehicles where space and weight considerations are critical. These advancements enable more efficient PCB integration and reduce the overall footprint of electronic systems in vehicles.

Growth of Electric Commercial Vehicles

The trend of electrification extends to commercial vehicles, including buses, trucks, and delivery vans. As governments and businesses prioritize sustainability, the demand for PCBs tailored to commercial EVs is growing. These PCBs focus on optimizing efficiency, extending range, and managing the complex energy requirements of larger and heavier vehicles, further expanding the market.

Environmental Concerns and Sustainable Practices

Sustainability is a growing concern in the automotive industry, influencing the design and manufacturing of PCBs. PCB manufacturers and automakers are adopting sustainable practices, including the use of eco-friendly materials, energy-efficient production processes, and recycling initiatives. These efforts aim to reduce the environmental impact of PCBs throughout their lifecycle, aligning with broader environmental goals.

Key Market Challenges

Technological Complexity and Miniaturization

As vehicles become more technologically advanced and compact, the demand for smaller, denser PCBs with increased functionality is on the rise. Achieving miniaturization while ensuring reliability and thermal management poses a significant challenge. PCB manufacturers must continually innovate to meet the demands of compact electronic systems in modern vehicles.

Electromagnetic Interference (EMI)

Vehicles are increasingly equipped with numerous electronic components that can generate electromagnetic interference. EMI can lead to signal degradation, affecting the performance of sensitive electronic systems. PCBs need to be designed with EMI shielding and isolation in mind to ensure optimal performance and compliance with electromagnetic compatibility (EMC) standards.

Thermal Management

Electronic components in vehicles generate heat, which can be detrimental to the performance and lifespan of PCBs. Ensuring effective thermal management to dissipate heat is crucial for maintaining the reliability of PCBs. In electric vehicles (EVs) and autonomous vehicles, which often contain high-power components, thermal management becomes an even more critical challenge.

Reliability and Durability

PCBs in automotive applications must operate reliably under harsh environmental conditions, including extreme temperatures, humidity, and vibrations. The long-term durability and resistance to wear and tear are essential to ensure that PCBs continue to function properly throughout a vehicle's lifespan.

High-Cost Pressure

While the demand for advanced PCBs in vehicles is increasing, there is also pressure to keep costs down. This is particularly challenging given the need for high-quality, reliable PCBs that meet automotive industry standards. Balancing cost-effectiveness with quality and performance is a constant challenge for PCB manufacturers.

Supply Chain Disruptions

The global supply chain, including the PCB manufacturing sector, is susceptible to disruptions such as natural disasters, geopolitical tensions, and the COVID-19 pandemic. Disruptions in the supply chain can lead to delays in production and increased costs. PCB manufacturers must develop resilient supply chain strategies to mitigate these risks.

Regulatory Compliance

The automotive industry is subject to stringent regulatory standards, including safety, emissions, and electromagnetic compatibility (EMC) regulations. PCBs used in vehicles must comply with these standards, which can vary by region and market. Ensuring that PCBs meet the necessary regulatory requirements is a complex challenge that requires ongoing testing and validation.

Design Complexity and Integration

The increasing complexity of vehicle electronics requires PCBs to support a wide range of functions, from engine control to advanced driver-assistance systems (ADAS). Integrating multiple functions onto a single PCB while maintaining reliability and avoiding interference is a design challenge. PCB designers must balance functionality with space constraints and thermal considerations.

Materials and Sustainability

The materials used in PCB manufacturing, including copper and various chemicals, can have environmental impacts. Ensuring that PCB manufacturing processes are sustainable and minimize the use of hazardous materials is a growing concern. PCB manufacturers must adopt eco-friendly practices and materials to align with sustainability goals.

Component Shortages and Lead Times

The global electronics industry has faced component shortages, including semiconductors, resistors, and capacitors. These shortages can impact the production of PCBs and lead to delays in vehicle manufacturing. Managing component supply chain challenges and lead times is critical to meet production schedules.

Compatibility and Interoperability

With multiple PCBs from different suppliers integrated into a single vehicle, ensuring compatibility and interoperability is a significant challenge. Compatibility issues can arise when components from different sources don't communicate seamlessly, leading to malfunctions or reduced system performance. Standardization and compatibility testing efforts are essential to address this challenge.

Cybersecurity

As vehicles become more connected, they are vulnerable to cybersecurity threats. PCBs and their embedded systems must be designed with robust cybersecurity measures to protect against hacking and data breaches. Ensuring the security of PCBs in an increasingly interconnected automotive ecosystem is an ongoing challenge.

Talent Shortage

The development and maintenance of advanced PCBs require a skilled workforce with expertise in electronics, materials science, and PCB design. There is a shortage of qualified talent in these areas, which can hinder innovation and product development in the PCB industry.

Key Market Trends

Increasing Vehicle Electrification

One of the most prominent trends in the Automotive PCB Market is the rapid rise in vehicle electrification. Electric vehicles (EVs) and hybrid vehicles require advanced PCBs to manage power distribution, battery management, and charging systems. As automakers globally invest in EV technology to meet emissions standards and consumer demand for sustainable transportation, the demand for specialized PCBs tailored to electric powertrains is on the rise.

Autonomous Driving Technology

The development and deployment of autonomous driving technology are driving significant innovation in PCB design and manufacturing. Autonomous vehicles rely on a complex array of sensors, cameras, radar, and lidar systems to perceive and navigate their surroundings. These sensors generate vast amounts of data that require real-time processing and decision-making, demanding high-performance PCBs. As autonomous driving technology advances, the Automotive PCB Market is experiencing a surge in demand for PCBs capable of handling the data-intensive requirements of self-driving cars.

Integration of Advanced Driver-Assistance Systems (ADAS)

The proliferation of advanced driver-assistance systems (ADAS) is a critical trend

shaping the Automotive PCB Market. ADAS features such as adaptive cruise control, lane-keeping assist, and collision avoidance rely heavily on PCBs for sensor data interpretation and decision-making. Consumers are increasingly valuing safety features, pushing automakers to incorporate more ADAS components into their vehicles. This trend not only enhances road safety but also drives the demand for PCBs tailored for ADAS functions.

Connectivity and Infotainment Systems

Consumer expectations for connectivity, infotainment, and advanced user interfaces in vehicles are on the rise. PCBs play a pivotal role in delivering these features, including smartphone integration, voice recognition, high-definition displays, and entertainment systems. The demand for PCBs customized for connectivity and infotainment is fueled by the desire for an enriched in-car experience. As vehicles become extensions of digital lifestyles, this trend will continue to influence PCB design and production.

Lightweight and Miniaturization

Advances in materials science and miniaturization techniques are driving the development of smaller and lighter PCBs. In an era of electric and autonomous vehicles, where space and weight considerations are critical, PCB miniaturization is essential for efficient integration and vehicle design. These advancements enable more compact electronic systems while maintaining performance and reliability.

High-Frequency PCBs for Advanced Communication

The demand for high-frequency PCBs is growing due to their use in advanced communication systems in vehicles. These PCBs are essential for vehicle-to-vehicle (V2V) and vehicle-to-infrastructure (V2I) communication, enabling real-time data exchange and enhancing road safety. The growth of smart cities and IoT technologies is further driving the need for high-frequency PCBs in the automotive sector.

Advanced Materials for Enhanced Performance

PCB manufacturers are increasingly utilizing advanced materials to improve performance and reliability. High-performance materials with superior heat resistance, durability, and dielectric properties are in demand, especially for PCBs used in EVs and autonomous vehicles. These materials enable PCBs to withstand extreme conditions and ensure long-term reliability.

Integration and Consolidation of Function

To reduce complexity and improve efficiency in vehicle electronics, automakers are integrating multiple functions into a single PCB. This trend minimizes the number of PCBs in a vehicle, streamlining manufacturing and reducing costs. For example, integrated PCBs may handle both engine control and transmission control, simplifying vehicle architecture.

Sustainable Manufacturing Practices

Sustainability is a growing concern in the automotive industry, and this trend is affecting PCB manufacturing. PCB manufacturers and automakers are adopting sustainable practices, including the use of eco-friendly materials, energy-efficient production processes, and recycling initiatives. These efforts aim to reduce the environmental impact of PCBs throughout their lifecycle.

Enhanced Testing and Quality Control

With the increasing complexity and critical role of PCBs in vehicles, there is a growing emphasis on testing and quality control. Manufacturers are investing in advanced testing techniques, including automated optical inspection (AOI) and X-ray inspection, to ensure PCBs meet stringent quality standards. Quality control measures are essential to avoid costly recalls and ensure the reliability of electronic systems.

Standardization and Interoperability

With multiple PCBs from different manufacturers integrated into a single vehicle, ensuring interoperability and standardization is a significant challenge. Compatibility issues can arise when components from different sources don't communicate seamlessly, leading to malfunctions or reduced system performance. Standardization efforts are ongoing to address these issues and simplify integration.

Cybersecurity

As vehicles become more connected, they are susceptible to cybersecurity threats. PCBs and their embedded systems must be designed with robust cybersecurity measures to protect against hacking and data breaches. Ensuring the security of PCBs in an increasingly interconnected automotive ecosystem is an ongoing challenge.

Segmental Insights

Propulsion Type Insights

Propulsion type plays a pivotal role in shaping the dynamics of the global automotive PCB market. The market can be broadly segmented into Internal Combustion Engines (ICE), Hybrid Electric Vehicles (HEV), and Electric Vehicles (EV). The ICE segment has traditionally dominated the market, owing to the widespread use of these engines globally. However, with increasing environmental concerns and the push for greener alternatives, the HEV and EV segments are experiencing robust growth. This trend is expected to escalate demand for automotive PCBs specifically designed for these vehicles, driving market growth.

Vehicle Type Insights

In the global Automotive Printed Circuit Board (PCB) market, several vehicle types stand as significant contributors. Passenger vehicles, for instance, hold a significant share due to the growing demand for advanced safety features, infotainment systems, navigation services, and other electronic components. The presence of numerous PCBs in these vehicles aids in seamlessly integrating these complex features. Commercial vehicles, on the other hand, are expected to exhibit notable growth over the forecast period. The adoption of fleet management services, telematics, and other electronic systems in commercial vehicles is driving the demand for automotive PCBs in this sector. As technology advances, it's anticipated that hybrid and electric vehicles will also present substantial opportunities for the PCB market, considering the significant electronic content in these vehicles.

Regional Insights

The global automotive PCB (Printed Circuit Board) market is witnessing substantial growth, driven by the rise in vehicle electrification and the increased demand for advanced safety features in automobiles. In terms of regional insights, Asia-Pacific is projected to dominate the market, attributed to the robust automotive industry and the growing adoption of electric vehicles, especially in countries like China and Japan. North America and Europe follow closely, with significant growth propelled by the integration of advanced electronics in vehicles and the presence of prominent automobile manufacturers. However, the market growth in these regions is expected to face challenges due to regulatory norms related to vehicle emissions.

Key Market Players

Infineon Technologies AG

Samsung Electro Mechanics

CMK Corporation

Amitron Corporation

KCE Group

Deaduck Phil. Inc.

MEIKO ELECTRONICS Co., Ltd.

CHIN POON Industrial Co., Ltd.

Unimicron Group

STMicroelectronics N.V.

Report Scope:

In this report, the Global Automotive PCB Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive PCB Market, By Propulsion:

IC Engine

Electric

Automotive PCB Market, By Vehicle Type:

Passenger Cars

Commercial Vehicles

Automotive PCB Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive PCB Market.

Available Customizations:

Global Automotive PCB Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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