

Asia Pacific Substrate-Like PCB Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific Substrate-Like PCB Market is projected to grow significantly, reaching an estimated US\$ 4,210.6 million by 2031, up from US\$ 1,688.3 million in 2024. This growth represents a compound annual growth rate (CAGR) of 12.3% from 2024 to 2031.

Executive Summary and Market Analysis

The substrate-like PCB market in the Asia Pacific region is divided into several key countries, including China, India, Japan, Australia, South Korea, and the Rest of APAC. A major driver of this market is the increasing demand for smartphones. According to the GSM Association's report from July 2023, smartphone adoption in the Asia Pacific is expected to rise to 94% by 2030, reflecting a 76% increase from 2022. This surge is attributed to enhanced digital literacy and the availability of affordable smartphones. As smartphone manufacturers strive to create more compact and flexible devices, particularly foldable phones, the demand for substrate-like PCBs is expected to rise.

Additionally, the growing internet usage and the escalating demand for 5G connectivity are further propelling market growth. The Cisco annual Internet report indicates that Asia Pacific reached 3.1 billion internet users in 2023, and it is projected that the region will account for 41% of global 5G mobile connections by 2030, marking a 4% increase from 2022, as per the GSM Association. Notably, approximately 50% of global 5G trials are being conducted in the Asia Pacific region.

Modern smartphones require high-speed data transfer between components such as memory and central processing units (CPUs). Substrate-like PCBs are essential for maintaining high-speed signal integrity, ensuring smooth and reliable data transmission.

The increasing adoption of smartphones and the high demand for 5G connectivity are thus significant factors driving the growth of the substrate-like PCB market.

Strategic Insights

Market Segmentation Analysis

The Asia Pacific Substrate-Like PCB Market can be segmented based on various criteria:

By Line or Space: The market is divided into categories of 25 or 25 and 30 or 30 Micron, and less than 25 or 25 Micron. In 2024, the 25 or 25 and 30 or 30 Micron segment held the largest market share.

By Fabrication Process: The market is categorized into MSAP (Modified Semi-Additive Process) and UV LDI (Ultraviolet Laser Direct Imaging). The MSAP process dominated the market in 2024.

By Application: The market is segmented into Consumer Electronics, Automotive, Industrial, Medical, and Others, with the Others category holding the largest share in 2024.

Market Outlook

The advent of 5G communication technology is set to revolutionize various PCB applications, particularly in the telecommunications sector. 5G technology offers higher data rates, extensive device connectivity, and reduced latency compared to previous generations. One of the critical challenges in 5G networks is managing millimeter-wave frequencies (ranging from 24 GHz to 100 GHz), which are essential for achieving the required data throughput and capacity. This challenge drives the demand for substrate-like PCBs, which provide improved impedance management, lower signal loss, and reduced electromagnetic interference (EMI). These attributes are vital for maintaining signal quality in high-frequency applications, including 5G base stations, antennas, and user devices.

Moreover, there is a growing investment in 5G technology across various sectors, including consumer electronics, automotive, medical, data centers, and industrial

applications. For instance, data from the Federal Communications Commission in August 2024 indicates that telecom operators worldwide are planning to invest approximately US\$ 900 million in 5G deployment, focusing on Open RAN and new services for consumers and enterprises. Devices such as smartphones, wearables, and IoT-enabled gadgets require compact, lightweight, and high-performance PCBs, making substrate-like PCBs an ideal solution due to their ability to support high levels of integration and complex interconnections.

The reliability of substrate-like PCBs is crucial for 5G applications, as they can withstand the thermal and mechanical stresses associated with high-frequency operations, thereby extending the lifespan of components used in 5G networks. Consequently, the increasing adoption of 5G technology is expected to create significant opportunities for growth in the substrate-like PCB market during the forecast period.

Country Insights

The Asia Pacific Substrate-Like PCB Market is further segmented by country, with China holding the largest market share in 2024. The development of 5G infrastructure and the demand for multi-layer PCBs from various industries are encouraging market players to enhance production capabilities and develop customized PCBs to meet evolving customer needs. Government initiatives aimed at promoting awareness of the benefits of substrate-like PCBs are also contributing to market growth. For example, in April 2022, Shenzhen Kinwong Electronic Co., Ltd. received the China Patent Excellence Award for its innovative multi-layer PCB production method, which is widely used in 5G base stations, data storage, servers, and other critical applications.

Company Profiles

Key players in the Asia Pacific Substrate-Like PCB Market include AT & S Austria Technologie & Systemtechnik Aktiengesellschaft, Samsung Electro-Mechanics Co Ltd, TTM Technologies Inc., Zhen Ding Tech. Group Technology Holding Limited, Compeq Manufacturing Co., Ltd., Kinsus Interconnect Technology, Korea Circuit, LG Innotek Co., Ltd., Shenzhen Kinwong Electronic Co., Ltd., and ICAPE Holding SA. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their product offerings and increase market share.

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