

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

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Abstracts

The Europe Substrate-Like PCB Market is projected to grow significantly, reaching an estimated US\$ 976.9 million by 2031, up from US\$ 433.9 million in 2024. This growth represents a compound annual growth rate (CAGR) of 13.1% from 2024 to 2031.

Executive Summary and Market Analysis

Key countries driving the growth of the substrate-like PCB market in Europe include Germany, France, the UK, and Italy. A major factor contributing to this growth is the telecommunications sector, which is undergoing rapid expansion due to the establishment of 5G networks. According to Ericsson's mobility report, 5G subscription penetration in Western Europe was 13% in 2022 and is expected to soar to 88% by the end of 2028. This surge in 5G adoption is increasing the demand for substrate-like PCBs, which are essential for ensuring that 5G devices operate efficiently without disrupting existing systems.

Substrate-like PCBs play a crucial role in connecting various electronic components, such as capacitors, amplifiers, microprocessors, and resistors, facilitating the flow of electrical signals throughout the system. The telecommunications industry relies heavily on high-performance PCBs to maintain signal integrity and enable high-speed data transmission, particularly in advanced communication technologies like fiber optics and 5G. This reliance is driving the demand for substrate-like PCBs, which enhance the performance of high-speed signals in telecommunication systems.

Strategic Insights

Market Segmentation Analysis

The Europe Substrate-Like PCB Market can be segmented based on several criteria:

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

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

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

Market Outlook

Thermal management is becoming increasingly critical at both the bare PCB and assembly levels, especially in high-power and high-voltage applications where effective heat transfer and cooling solutions are essential. Substrate-like PCBs, made from materials such as polyimide, Bismaleimide Triazine (BT) resin, and glass fiber-reinforced epoxy resin (FR-4), offer superior thermal conductivity compared to other circuit board materials. This makes them ideal for various industries that require efficient heat dissipation from electronic components, thereby enhancing device reliability and longevity.

For example:

Consumer Electronics: In high-end smartphones, laptops, and gaming consoles, substrate-like PCBs are utilized to manage heat generated by processors and GPUs. As these devices become more complex, effective heat control is vital for maintaining performance and durability.

Automotive Industry: Electric vehicles (EVs) and autonomous systems depend on substrate-like PCBs for thermal stability, particularly in power electronics and battery management systems. Efficient thermal management is crucial for the safety and performance of battery systems in EVs, where substrate-like PCBs are used in battery chargers, power inverters, and motor controllers.

Telecommunications: High-frequency transmissions in telecommunications require effective thermal management due to the heat generated by power amplifiers. Substrate-like PCBs are essential in base stations and communication centers, particularly for 5G networks, where efficient thermal management is critical to prevent service disruptions.

Medical Devices: In the medical field, maintaining optimal operating temperatures is vital for equipment performance and patient safety. Substrate-like PCBs are employed in advanced diagnostic equipment, such as MRI machines, to prevent overheating and extend device life.

The demand for substrate-like PCBs is further fueled by their ability to enable product miniaturization, enhance performance, and improve thermal and mechanical properties across various sectors, including consumer electronics, automotive, medical, telecommunications, and aerospace.

Country Insights

The Europe Substrate-Like PCB Market is also analyzed by country, with Germany, France, Italy, the UK, Russia, and the Rest of Europe being key regions. Germany, in particular, held the largest market share in 2024. The growth of the automotive sector in Germany, especially the increasing adoption of electric vehicles, is expected to drive demand for substrate-like PCBs. According to the German Association of the Automotive Industry (VDA), there were 72,550 new electric vehicle registrations in December 2023, indicating a robust expansion of the EV market. Substrate-like PCBs are integral to the electrical conversion processes in EVs, facilitating energy flow from batteries to electric motors and enhancing energy efficiency.

Company Profiles

Key players in the Europe 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 pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative

solutions to consumers.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. SUBSTRATE-LIKE PCB MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
- 4.4 List of Vendors in the Value Chain

5. EUROPE SUBSTRATE-LIKE PCB MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. SUBSTRATE-LIKE PCB MARKET - EUROPE MARKET ANALYSIS

6.1 Europe Substrate-Like PCB Market Revenue (US\$ Million), 2024 - 2031

6.2 Europe Substrate-Like PCB Market Forecast and Analysis

7. EUROPE SUBSTRATE-LIKE PCB MARKET REVENUE ANALYSIS - BY LINE OR SPACE

7.1 25 or 25 and 30 or 30 Micron

7.1.1 Overview

7.1.2 25 or 25 and 30 or 30 Micron: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Less than 25 or 25 Micron

7.2.1 Overview

7.2.2 Less than 25 or 25 Micron: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. EUROPE SUBSTRATE-LIKE PCB MARKET REVENUE ANALYSIS - BY FABRICATION PROCESS

8.1 MSAP

8.1.1 Overview

8.1.2 MSAP: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 UV LDI

8.2.1 Overview

8.2.2 UV LDI: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. EUROPE SUBSTRATE-LIKE PCB MARKET REVENUE ANALYSIS - BY APPLICATION

9.1 Consumer Electronics

9.1.1 Overview

9.1.2 Consumer Electronics: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Automotive

9.2.1 Overview

9.2.2 Automotive: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Industrial

9.3.1 Overview

9.3.2 Industrial: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4 Medical

9.4.1 Overview

9.4.2 Medical: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.5 Others

9.5.1 Overview

9.5.2 Others: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. EUROPE SUBSTRATE-LIKE PCB MARKET - COUNTRY ANALYSIS

10.1 Europe

10.1.1 Europe Substrate-Like PCB Market Revenue and Forecast and Analysis - by Country

10.1.1.1 Europe Substrate-Like PCB Market Revenue and Forecast and Analysis - by Country

10.1.2.2 Germany: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.1.2.2.1 Germany: Europe Substrate-Like PCB Market Share - by Line Or Space

10.1.2.2.2 Germany: Europe Substrate-Like PCB Market Share - by Fabrication Process

10.1.2.2.3 Germany: Europe Substrate-Like PCB Market Share - by Application

10.2.3.3 France: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2.3.3.1 France: Europe Substrate-Like PCB Market Share - by Line Or Space

10.2.3.3.2 France: Europe Substrate-Like PCB Market Share - by Fabrication Process

10.2.3.3.3 France: Europe Substrate-Like PCB Market Share - by Application

10.3.4.4 Italy: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.3.4.4.1 Italy: Europe Substrate-Like PCB Market Share - by Line Or Space

10.3.4.4.2 Italy: Europe Substrate-Like PCB Market Share - by Fabrication Process

10.3.4.4.3 Italy: Europe Substrate-Like PCB Market Share - by Application

10.4.5.5 United Kingdom: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.4.5.5.1 United Kingdom: Europe Substrate-Like PCB Market Share - by Line Or

Space

10.4.5.5.2 United Kingdom: Europe Substrate-Like PCB Market Share - by Fabrication Process

10.4.5.5.3 United Kingdom: Europe Substrate-Like PCB Market Share - by Application

10.5.6.6 Russia: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.5.6.6.1 Russia: Europe Substrate-Like PCB Market Share - by Line Or Space

10.5.6.6.2 Russia: Europe Substrate-Like PCB Market Share - by Fabrication Process

10.5.6.6.3 Russia: Europe Substrate-Like PCB Market Share - by Application

10.6.7.7 Rest of Europe: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.6.7.7.1 Rest of Europe: Europe Substrate-Like PCB Market Share - by Line Or Space

10.6.7.7.2 Rest of Europe: Europe Substrate-Like PCB Market Share - by Fabrication Process

10.6.7.7.3 Rest of Europe: Europe Substrate-Like PCB Market Share - by Application

11 COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning & Concentration

12 INDUSTRY LANDSCAPE

12.1 Overview

12.2 New Product Development

12.3 Merger and Acquisition

12.4 Other Strategic Developments

13 COMPANY PROFILES

13.1 AT & S Austria Technologie & Systemtechnik Aktiengesellschaft

13.1.1 Key Facts

13.1.2 Business Description

13.1.3 Products and Services

13.1.4 Financial Overview

- 13.1.5 SWOT Analysis
- 13.1.6 Key Developments
- 13.2 Samsung Electro-Mechanics Co Ltd
 - 13.2.1 Key Facts
 - 13.2.2 Business Description
 - 13.2.3 Products and Services
 - 13.2.4 Financial Overview
 - 13.2.5 SWOT Analysis
 - 13.2.6 Key Developments
- 13.3 TTM Technologies Inc.
 - 13.3.1 Key Facts
 - 13.3.2 Business Description
 - 13.3.3 Products and Services
 - 13.3.4 Financial Overview
 - 13.3.5 SWOT Analysis
 - 13.3.6 Key Developments
- 13.4 Zhen Ding Tech. Group Technology Holding Limited
 - 13.4.1 Key Facts
 - 13.4.2 Business Description
 - 13.4.3 Products and Services
 - 13.4.4 Financial Overview
 - 13.4.5 SWOT Analysis
 - 13.4.6 Key Developments
- 13.5 Compeq Manufacturing Co., Ltd.
 - 13.5.1 Key Facts
 - 13.5.2 Business Description
 - 13.5.3 Products and Services
 - 13.5.4 Financial Overview
 - 13.5.5 SWOT Analysis
 - 13.5.6 Key Developments
- 13.6 Kinsus Interconnect Technology
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 Korea Circuit
 - 13.7.1 Key Facts

- 13.7.2 Business Description
- 13.7.3 Products and Services
- 13.7.4 Financial Overview
- 13.7.5 SWOT Analysis
- 13.7.6 Key Developments
- 13.8 LG Innotek Co Ltd
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments
- 13.9 Shenzhen Kinwong Electronic Co., Ltd.
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 ICAPE Holding SA
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments

14. APPENDIX

- 14.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Europe Substrate-Like PCB Market Segmentation

Table 2. List of Vendors

Table 3. Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Line Or Space

Table 5. Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fabrication Process

Table 6. Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 7. Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 8. Germany: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Line Or Space

Table 9. Germany: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fabrication Process

Table 10. Germany: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 11. France: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Line Or Space

Table 12. France: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fabrication Process

Table 13. France: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 14. Italy: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Line Or Space

Table 15. Italy: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fabrication Process

Table 16. Italy: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 17. United Kingdom: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Line Or Space

Table 18. United Kingdom: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fabrication Process

Table 19. United Kingdom: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 20. Russia: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Line Or Space

Table 21. Russia: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fabrication Process

Table 22. Russia: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 23. Rest of Europe: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Line Or Space

Table 24. Rest of Europe: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fabrication Process

Table 25. Rest of Europe: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 26. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Europe Substrate-Like PCB Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Substrate-Like PCB Market

Figure 4. Europe Substrate-Like PCB Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Europe Substrate-Like PCB Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Europe Substrate-Like PCB Market Share (%) - by Line Or Space, 2024 and 2031

Figure 8. 25 or 25 and 30 or 30 Micron: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Less than 25 or 25 Micron: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Europe Substrate-Like PCB Market Share (%) - by Fabrication Process, 2024 and 2031

Figure 11. MSAP: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. UV LDI: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Europe Substrate-Like PCB Market Share (%) - by Application, 2024 and 2031

Figure 14. Consumer Electronics: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Automotive: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Industrial: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Medical: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Others: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Europe Substrate-Like PCB Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 20. Germany: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. France: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Italy: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. United Kingdom: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Russia: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Rest of Europe: Europe Substrate-Like PCB Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. Company Positioning & Concentration

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