

South & Central America Substrate-Like PCB Market Size and Forecast (2021 - 2031)

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Abstracts

The South & Central America Substrate-Like PCB Market is projected to grow significantly, reaching an estimated US\$ 131.1 million by 2031, up from US\$ 59.9 million in 2024. This growth represents a compound annual growth rate (CAGR) of 11.0% from 2024 to 2031.

Executive Summary and Market Analysis

The burgeoning smartphone industry is a key driver of demand for substrate-like PCBs, as manufacturers seek to enhance the thermal management capabilities of their devices. According to the GSM Association, smartphone penetration in South & Central America reached 76% in 2022 and is expected to rise to 83% by 2025. Additionally, the region is set to invest US\$ 54 million in mobile capital expenditures to boost 5G technology adoption by 60% by 2030. This increasing demand for 5G technology is further propelling the need for substrate-like PCBs across various sectors in South & Central America.

Strategic Insights

Market Segmentation Analysis

The South & Central America 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 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). MSAP was the leading segment 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

Traditionally, materials like ceramics have been the backbone of PCBs. However, recent innovations have shifted the focus towards advanced PCB substrates. These substrates, which include epoxy resin, polytetrafluoroethylene (PTFE), glass fiber weave, flexible polymers, and other dielectric materials, are evolving from conventional materials to nanocomposites. These modern materials not only provide mechanical support but also ensure electrical insulation for the components of the PCB. They serve as the foundation for mounting conductive pathways and electronic components, facilitating the flow of electrical impulses throughout the circuit.

As manufacturers of electronics strive to create more advanced devices, the adoption of innovative PCB substrates is on the rise. Some notable advancements in materials include:

High-Frequency Materials: Materials such as PTFE and ceramic-filled hydrocarbons are crucial for the development of PCB substrates. They minimize signal loss and enhance signal integrity, which is essential for transmitting data at higher frequencies. The use of these materials enables the production of PCBs capable of handling the high data rates required for next-generation wireless communications and other high-frequency applications.

Flexible and Rigid-Flex Substrates: The advent of flexible and rigid-flex substrates, often made from polyimide, allows PCBs to bend and conform to non-planar surfaces, opening up possibilities for wearable technology. Rigid-flex substrates combine both flexible and rigid materials within a single board, striking a balance between flexibility and structural integrity. This innovation is transforming product design, paving the way for foldable smartphones, flexible displays, and compact electronic devices.

Nanocomposite Materials: The integration of nanoparticles into base materials enhances PCB substrates significantly. These carbon-based nanoparticles improve mechanical strength, thermal conductivity, and electrical properties, resulting in better performance, reduced size, and increased reliability. Nanocomposites are particularly advantageous in aerospace and medical device applications, where size and weight are critical factors. As material technology advances, the incorporation of nanocomposite materials into PCB substrates is expected to boost the efficiency and performance of electronic devices.

Country Insights

The South & Central America Substrate-Like PCB Market is further analyzed by country, with Brazil, Argentina, and the Rest of South & Central America being the primary segments. Brazil is anticipated to hold the largest market share in 2024.

The demand for eco-friendly solutions and increased investments by automotive manufacturers in electric vehicle (EV) production are driving the substrate-like PCB market in Brazil. For example, Volkswagen has announced plans to invest US\$ 1.06 billion to enhance car production by 40% by 2026, with intentions to launch 15 new electric and flex-fuel vehicle models by the end of 2025. The design of DC-DC converters, which are essential for effective power conversion from high-voltage batteries to low-voltage components, relies on substrate-like PCBs. This necessity has led to a greater adoption of substrate-like PCBs among automotive manufacturers.

Company Profiles

Key players in the South & Central America 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 products to consumers.

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