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Substrate-Like PCB Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Line/Space (25/25 and 30/30 µm and Less than 25/25 µm), Fabrication Process (MSAP and UV LDI), Application (Consumer Electronics, Automotive, Industrial, Medical, and Others), and Geography

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Abstracts

The Substrate-Like PCB market size is expected to reach US$ 7.16 billion by 2031 from 2.97 billion in 2024, at an estimated CAGR of 13.4% from 2023 to 2031.

By Geography the Substrate-Like PCB market is segmented into North America, Europe, Asia Pacific, Middle East and Africa, and South and Central America. In 2023, the Asia Pacific regions is growing with a significant growth rate. The development of 5G network infrastructure and demand for multi-layer PCBs from industries encourages market players to increase their production and develop customized PCBs to fulfill their customers' dynamic needs. Government initiatives and focus on creating awareness related to the benefits of substrate-like PCBs are fueling the market growth. For instance, in April 2022, the China Intellectual Property Office awarded Shenzhen Kinwong Electronic Co., Ltd. with the China Patent Excellence Award for developing a multi-layer PCB production method and multi-layer PCB board. These multi-layer PCB boards are commonly used in 5G base stations, data storage, servers, switching routers, satellite systems, industrial control, and medical equipment. Moreover, the growing industrial demand for multi-layer PCBs encourages Shenzhen Kinwong Electronic Co., Ltd. to produce and manufacture a variety of multi-layer products with significant industrialization benefits. The substrate-like PCB market in South Korea is anticipated to expand during the forecast period owing to the increased focus by the

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government and market players to enhance the electronics manufacturing industry. For instance, IPC International, Inc. conducted a PC K-FEST 2024, the second annual IPC Korea Festival of Electronics Standards and Technology seminar in Seoul, on October 29, 2024. The seminar was organized to address challenges in the electronics manufacturing industry, demonstrating the way IPC standards enhance manufacturing performance and quality. Moreover, market players are focusing on expanding their business in South Korea to attract new customers, which is likely to create opportunities in the market during the forecast period. For instance, on January 06, 2024, Xiaomi launched a new subsidiary and a range of smart devices, including smartphones, wearables, TVs, power banks, and robot vacuum cleaners, to expand its presence in South Korea. These products support Xiaomi to cater to various consumer needs of budget-friendly to premium devices. As electronic devices become more compact and miniature, the demand for smaller and more efficient circuit boards also increases. Smartphones, tablets, wearables, and IoT gadgets all use substrate-like PCBs for their high-density packing.

The Substrate-Like PCB market analysis has been carried out by considering the following segments: Line/Space, Fabrication Process, Application.

On the basis of line/space, the substrate-like PCB market is segmented into 25/25 and 30/30 µm and less than 25/25 µm. SLP technology demands line width/line spacing equal to or less than 30/30 µm, reducing the size of the main board and allowing more space for extra components. The growing demand from end users for thinner/compact but more functioning smartphones necessitates a steady reduction in board area. A reduction in board area enables the implementation of a larger battery; as a result, various smartphone manufacturers are adopting substrate-like PCBs of 25/25 and 30/30 µm line/space. For example, Samsung and Apple recently used substrate-like PCBs with linewidth/spacing of 25/25 ?m and 30/30 ?m in their smartphones. Because of their reduced linewidth, substrate-like PCBs for smartphones might hold twice as many electronic components as HDI boards. Further, this SLP is also finding applications in computing and communications, automotive, and medical devices. Apple has used SLPs in its watch series.

Moreover, factor such as high demand from consumer electronics industry and surge in demand for thermal management propel the Substrate-Like PCB market growth. Also, miniaturization of PCBs is expected to bring new Substrate-Like PCB market trends in the coming years.

On the basis of fabrication process, the substrate-like PCB market is segmented into

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MSAP and UV LDI. Modified semi-additive processing (MSAP) processes involve a thin laminated copper foil greater than 1.5 µm. In this technology, the conducting paths used to conduct signals on a printed circuit board (PCB) or substrate are not etched out of a copper layer in the traditional way. Instead, the conductive material is only applied to the PCB in places where it is actually needed. Unlike the conventional method, this method allows for much tighter signal lines and smaller distances between the conducting paths, unlike the conventional approach. It offers various benefits, such as saving space by enabling denser layouts of conducting paths, paving the way for the miniaturization of PCBs and devices; reducing the size of PCBs; and creating more space for sensors, cameras, and larger batteries. Further, it lowers the risk of short circuits on densely packed circuit boards, as MSAP conducting paths (unlike their chemically created counterparts) do not require triangular cross-sections. This ensures that even with smaller distances between the lines, there is no risk of signal interference. MSAP is rapidly gaining popularity due to its ability to meet the demands of downsizing, high-density interconnects, and deliver optimum performance in electronics.

Compeq Manufacturing Co., Ltd.; Kinsus Interconnect Technology; Samsung Electro-Mechanics Co Ltd; AT & S Austria Technologie & Systemtechnik Aktiengesellschaft; Zhen Ding Tech. Group Technology Holding Limited; TTM Technologies Inc.; Korea Circuit; Shenzhen Kinwong Electronic Co., Ltd.; ICAPE Holding SA; and LG Innotek Co Ltd are among the key players profiled in the Substrate-Like PCB market report.

The Substrate-Like PCB market forecast is estimated on the basis of various secondary and primary research findings such as key company publications, association data, and databases. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the Substrate-Like PCB market growth. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the Substrate-Like PCB market.

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Contents

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6. SUBSTRATE-LIKE PCB MARKET – GLOBAL MARKET ANALYSIS

7. SUBSTRATE-LIKE PCB MARKET ANALYSIS – BY LINE/SPACE

8. SUBSTRATE-LIKE PCB MARKET ANALYSIS – BY FABRICATION PROCESS

9. SUBSTRATE-LIKE PCB MARKET ANALYSIS – BY APPLICATION

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10. SUBSTRATE-LIKE PCB MARKET – GEOGRAPHICAL ANALYSIS

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