Strategic Assessment of Worldwide Automotive PCB Market - Forecast Till 2021

Description:

PCBs are essential components in electronic devices. A PCB is a copper based board on which electrical wires are printed. These electrical wires are connected to other electronic components on the board. PCBs are used to upkeep and electrically connect all electronic components through conductive paths. Hence, the demand for PCBs is directly correlated to the growth of the automotive electronics industry and indirectly correlated to growth in vehicle shipments. PCBs play a very important role in the automotive electronics industry, as they form the fundamental structure for electronic connectivity. Hence as the usage of electronics increase in vehicles, the demand for PCBs is expected to grow. Market research analysts expect the Worldwide Automotive PCB to reach approx. US$10.91 billion by 2021.

Automotive PCB Application Segmentation:

The Worldwide Automotive PCB Market has been segmented on the basis of application, which include Interior Components, Powertrain components, Engine Controls Components, and Vehicle Lighting and Safety systems. The automotive PCB market for interior components is the largest segment in terms of application and accounted for $2.72 billion in 2012 and is expected to grow at a CAGR of around 6% between 2012 and 2021. Engine control components include anti-lock braking systems, ECU control units, electronic fuel injection system and automated locking systems among others. The common industry term for electronics for engine control is termed under the hood electronics. The automotive under the hood market accounted for $44.8 billion in 2014 and were expected to reach $77 billion by 2021, growing at a CAGR of 8% during 2014-2021.

Automotive PCB Geographic Segmentation:

The Worldwide Automotive PCB Market has been segmented on the basis of geography. This market research report has categorized the entire market into five regions namely North America, APAC, Europe, Latin America and Middle East & Africa. APAC is the largest PCB market and is expected to remain the largest during the forecast period. In 2012, APAC region accounted to 89.7% which was around $5.53 billion of the overall automotive PCB market and is expected to reach to $9.83 billion by 2021 growing at a CAGR of 6.6%. North America holds the second largest market followed by Europe, Latin America and the Middle East and Africa. APAC is the largest producer of automotive PCBs in the world, in terms of technology this region produces the highest volume of single-sided PCBs followed by multi-layer PCBs and Flexible PCBs.

Automotive PCB Market Dynamics:

This market research report provides market overview of the factors driving and restraining the growth of the market. The report also outlines the key trends emerging in the market that will contribute to the growth of the Worldwide Automotive PCB market during the forecast period. The factors driving the growth of the market include Electrification of automotive mechanics to achieve higher fuel economy. As automotive is major contributors of environmental pollution, various governing bodies across the world have directed regulations to reduce vehicle emissions along with increasing fuel economy of vehicles. To comply with regulations, OEMs and tire-1 suppliers have been actively investing in technologies to either reduce the weight of the vehicle or introduce electronically controlled vehicle mechanism to obtain higher accuracy in functioning leading to higher fuel efficiency and reducing tail pipe emissions. Moreover, adoption of infotainment systems in mass mid segment vehicles is another factor driving the growth of the market. Some of the major challenges confronting the Worldwide Automotive PCB market include gradual loss of low-cost advantage from Low-cost manufacturing countries. In earlier decades, within the automotive industry, there was an increase in outsourcing of manufacturing activities to low-cost countries such as China, Taiwan, South Korea and India owing to availability of low-cost labor as compared to western countries. However, these countries are gradually losing its cost advantage due to the raising labor cost, for instance in China the population has become more affluent and has moved up the learning curve leading to higher cost of employment. It is observed that PCB manufacturers, especially in China and Taiwan have been facing concerns over attrition as labors prefer moving to other manufacturers for small income raise. Another major factor curtailing the growth of Worldwide Automotive PCB market is shorter life cycle of automotive electronics. Technological innovations and dynamic consumer expectations are reducing the
average life cycle of vehicles as a whole, which is adding pressure on PCB and automotive electronics manufacturers to cater to demanding needs of OEMs and tire-1 suppliers. The report also provides the Porter’s five forces analysis along with a description of each of the forces and its impact on the market.

Automotive PCB Key Vendors:

This market research report profiles the major companies in the Worldwide Automotive PCB market and also provides the competitive landscape of key players. Within the report covers the entire market outlook regarding the value chain operating within the market. The major players in the market include Meiko, Chin Poon, CMK Corp., TTM Technologies, KCE Electronics. Other prominent vendors in the market include Daeduck Electronics, Multek, Tripod Technology.

The key objectives of the study are as follows:

- To provide a detailed analysis of how many automotive PCBs are being used today
- To provide a break-down of the various automotive segments which use automotive PCBs and also their contribution to the overall market
- To list the key regions and their respective countries that have employed this product
- To provide the competitive landscape of the key players operating in this market and how the market will evolve over the forecast period
- To provide strategic insights into what is happening in the market and what could as well as should happen in the market during the forecast period
- To provide key insights into the various factors that are aiding as well as adversely affecting the market and how this scenario will change during the forecast period

The scope of the study is as follows:

- The study will provide the unit shipments that have been sold in 2015 as well as the revenue generated by the sales of these units in the same year
- The study will also provide the historical data points for the above mentioned points
- The study will provide the regional segmentation for the units sold and revenue generated by the following regions
  - APAC
  - Americas
  - EMEA
- The study will further provide a break-up for the top 3 countries within each of these regions for the units sold as well as the revenue generated by the sale of these devices
- The forecast data for the units expected to be sold and the revenue to be generated will also be provided
- The study will not look at resale devices or refurbished devices
- Timeline of the study is as follows
  - Historical Period : 2013-2014 (Actual figures)
  - Base Year : 2015 (Actual figures)
  - Forecast Period: 2016-2020 (Forecasted figures)

Why should you buy this study?

The study will tell the reader how the market has been performing over the last few years and how it is expected to perform over the next five years. Detailed analysis of the performance of the market is provided thereby providing the reader with key insights into what is taking place and how the market is being affected, both positively and adversely. Individuals who are interested in knowing which the key companies are involved in the market as well as which are some of the key products which these companies sell should purchase this report. Organizations interested in entering or expanding their presence in the said market will understand which are the key application areas that are seeing high growth and the reasons for the same.

In short, the study will provide a detailed view of the automotive PCB market, which are the companies that sell these products, what are the factors that contribute to this market and also what are some of the trends that have started to surface and are expected to be a strong driving force in the market over the next five years.

Contents: 1 Research Methodology
2 Executive Summary
2.1 Report highlights

3 Scope of the report
3.1 Report coverage
3.2 Definitions of the products and markets

4 Market landscape - Automotive PCB Market
4.1 Introduction
4.2 Global automotive market - An overview
4.3 Life cycle of automotive electronic components - 2015 perspective
4.4 Market classification
4.5 PCB manufacturing technology
4.6 Value chain - Automotive PCB market
4.6.1 Materials/component suppliers
4.6.2 Most commonly used base raw materials
4.6.3 PCB manufacturers
4.6.4 Contract manufacturers - PCB
4.6.5 Tire-1 suppliers
4.6.6 OEMs
4.7 Integration activity
4.8 Top PCB manufacturers by geography
4.8.1 Few of the M&A activities include

5 Key Market Trends

6 Key Market Drivers

7 Key Market Challenges

8 Global Automotive PCB Market
8.1 Market Size and Forecast
8.2 Factors influencing the usage of PCBs in automotive market during the forecast period
8.3 Porter's five forces analysis

9 Market Segmentation

10 Market Segmentation by Application
10.1 Market size and forecast by application
10.2 Interior components market segmentation
10.2.1 Market size and forecast
10.3 Powertrain components market segmentation
10.3.1 Market overview
10.3.2 Additional electronic components used in hybrid and electric vehicles
10.3.3 Market size and forecast for semiconductor market for powertrain application
10.3.4 Market size and forecast
10.4 Engine control components market segmentation
10.4.1 Market overview
10.4.2 Market size and forecast for PCB market for engine control components
10.5 Vehicle lighting and safety systems market segmentation
10.5.1 Market overview
10.5.2 Evolution of autonomous parking systems
10.5.3 Government and transport authorities initiatives on safety
10.5.4 Market size and forecast for vehicle lighting and safety systems

11 Market Segmentation by Product Type
11.1.1 Market size and forecast
11.2 Single side PCB market segmentation
11.2.1 Market size and forecast
11.3 Multi-Layer PCB market segmentation
11.3.1 Market size and forecast
11.4 Flexible PCB market segmentation
11.4.1 Market size and forecast
12 Market Segmentation by Geography
12.1 Market overview

13 APAC Market for Automotive PCB
13.1 Market overview
13.1.1 Analysis of the top five countries in APAC
13.1.2 Per capita income of top five countries in APAC
13.1.3 Automotive sales by region
13.2 Adoption rate of safety systems by OEMs for APAC
13.3 Top PCB manufacturers in APAC
13.4 Market size and forecast
13.5 Market segmentation by application
13.5.1 Market overview
13.5.2 Market size and forecast
13.6 Market segmentation by product type
13.6.1 Market overview
13.6.2 Market size and forecast
13.7 Key leading countries
13.7.1 Market overview
13.8 Market size and forecast
13.9 China automotive PCB market
13.9.1 Market overview
13.9.2 Overview of Chinese electronics market
13.9.3 Market size and forecast
13.9.4 Major drivers, challenges, and trends in China
13.10 South Korea automotive PCB market
13.10.1 Market overview
13.10.2 Top five export industries in South Korea
13.10.3 Market size and forecast
13.10.4 Major drivers, challenges, and trends in South Korea
13.11 Japan automotive PCB market
13.11.1 Market overview
13.11.2 Market size and forecast
13.11.3 Major drivers, challenges, and trends in Japan
13.12 Taiwan automotive PCB market
13.12.1 Market overview
13.12.2 Automotive electronics market in Taiwan
13.12.3 Roadmap for Taiwan automotive electronics market
13.12.4 Market size and forecast
13.12.5 Major drivers, challenges, and trends in Taiwan

14 North America Market for Automotive PCB
14.1 Market overview
14.2 Outlook of hybrid and electric vehicles in North America
14.3 Automotive electronics market in the US
14.4 Market size and forecast
14.5 Market segmentation by application
14.5.1 Market overview
14.5.2 Market size and forecast
14.6 Market segmentation by product type
14.6.1 Market overview
14.6.2 Market size and forecast
14.7 Key leading country - The US
14.7.1 Market overview
14.7.2 Market size and forecast

15 Europe Market for Automotive PCB
15.1 Market overview
15.2 Market size and forecast
15.3 Factors driving the regulations
15.4 Market segmentation by application
15.4.1 Market size and forecast
15.5 Market segmentation by product type
15.5.1 Market size and forecast
15.6 Key Leading Country - Germany
15.6.1 Market overview
15.6.2 German electronic component market segmentation
15.6.3 Market size and forecast

16 Latin America Market for Automotive PCB
16.1 Market overview
16.2 GDP growth rate of top five Latin American countries
16.3 Market size and forecast
16.4 Key Leading Country - Brazil
16.4.1 Market overview
16.4.2 Automotive electronics market in Brazil
16.4.3 Market size and forecast

17 Middle East and Africa Market for Automotive PCB
17.1 Market overview
17.2 Automotive electronics manufacturers
17.3 Market size and forecast

18 Competitive Landscape
18.1 Market overview
18.2 Market share analysis of global PCB market
18.3 Market share analysis of global automotive PCB market
18.4 Competitive Benchmarking
18.5 Key news
18.6 Prominent vendors - Automotive PCB market
18.7 TTM Technologies
18.7.1 Business overview
18.7.2 Geographic segmentation
18.7.3 End consumer classification
18.7.4 Financial performance
18.7.5 Key strategies
18.7.6 Key strength
18.7.7 Key opportunities
18.7.8 Recent development in automotive end market:
18.8 Chin Poon
18.8.1 Business overview
18.8.2 Business segment
18.8.3 Financial performance
18.8.4 Key strategies
18.8.5 Key strength
18.8.6 Key opportunities
18.8.7 Recent development in automotive end market
18.9 Meiko Electronics
18.9.1 Business segmentation
18.9.2 Product portfolio
18.9.3 Financial performance
18.9.4 Key Strategies
18.9.5 Key opportunities
18.10 CMK Corporation
18.10.1 Business Segments
18.10.2 Product portfolio
18.10.3 Financial performance
18.10.4 Key strategies
18.10.5 Key Strength
18.10.6 Key Opportunities
18.11 KCE Electronics
18.11.1 Geographic presence
18.11.2 Financial performance
18.11.3 Key strategies
18.11.4 Key strength
18.11.5 Key opportunities
18.12 Other vendors
18.12.1 Daeduck Electronics
18.12.2 Multek
18.12.3 Tripod Technology

19 Appendix
19.1 List of abbreviations used in the report
19.2 List of companies mentioned in the report

20 Summary of the Report

List of Exhibits:
Exhibit 1 Top ten countries by GDP 2012-2015 ($ billion)
Exhibit 2 Global automotive shipment 2012-2021 (million units)
Exhibit 3 Global PCC market with automotive application share 2012-2021 ($ billion)
Exhibit 4 Life cycle of automotive electronic components, 2015
Exhibit 5 PCB market segmentation by application
Exhibit 6 Automotive PCBs manufacturing process flow
Exhibit 7 Common raw materials used in Automotive PCBs production
Exhibit 8 Automotive PCB market value chain
Exhibit 9 Net margins of key vendors
Exhibit 10 Top PCB manufacturers by geography 2014
Exhibit 11 OEMs cost pressure over electronic components
Exhibit 12 Exposure of temperature range in vehicles
Exhibit 13 Global EMS market 2005-2013 ($ billion)
Exhibit 14 US automotive-related CO2 emissions (million metric tons)
Exhibit 15 Global all electric and hybrid vehicle sales 2010-2014 (in thousand units)
Exhibit 16 Evolution of electronic components in automotive
Exhibit 17 Generations of automotive infotainment systems
Exhibit 18 Automotive sales in Asia 2005-2013 (in million units)
Exhibit 19 Automotive sales in Mexico 2005-2013 (in million units)
Exhibit 20 Automotive sales in Brazil 2005-2015 (in million units)
Exhibit 21 Functions of ADAS system in vehicles
Exhibit 22 Government initiatives to encourage safety systems using ADAS
Exhibit 23 Average monthly wages in China 2010-2015
Exhibit 24 Global automotive PCB market 2012-2021 ($ billion)
Exhibit 25 Factors influencing PCBs in automotive application
Exhibit 26 PCB application matrix
Exhibit 27 Market segmentation of automotive PCB market
Exhibit 28 Global automotive PCB market by application 2012-2021 ($ billion)
Exhibit 29 Global automotive PCB market for interior components 2012-2021 ($ billion)
Exhibit 30 Additional electronic components required in hybrid and electric vehicles
Exhibit 31 Automotive semiconductor market for powertrain application 2014-2021 ($ billions)
Exhibit 32 Global automotive PCB market for powertrain components 2012-2021 ($ billion)
Exhibit 33 Global automotive PCB market for engine control components 2012-2021 ($ billion)
Exhibit 34 Evolution of autonomous parking system
Exhibit 35 Government and Transport Authorities' Initiatives on Safety
Exhibit 36 Global automotive PCB market for vehicle lighting and safety systems 2012-2021 ($ billion)
Exhibit 37 Global automotive PCB market by product type 2012-2021 ($ billion)
Exhibit 38 Global automotive single side PCB market 2012-2020 ($ billion)
Exhibit 39 Global automotive multi-layer PCB market 2012-2021 ($ billion)
Exhibit 40 Global automotive flexible PCB market 2012-2021 ($ billion)
Exhibit 41 Global automotive PCB market by geography 2012-2021 ($ billion)
Exhibit 42 Top five APAC countries by GDP 2011-2015 ($ billion)
Exhibit 43 Per capita income of top five countries in APAC 2013-2014 ($)
Exhibit 44 Automotive sales by region 2010-2014 (million units)
Exhibit 45 Adoption rate of safety systems by OEMs for APAC market, 2014
Exhibit 46 Top PCB manufacturers in APAC region, 2014
Exhibit 47 Automotive PCB market in APAC 2012-2021 ($ billion)
Exhibit 48 APACs automotive PCB market by product type 2012-2021 ($ billion)
Exhibit 49 APACs automotive PCB market by product type 2012-2021 ($ billion)
Exhibit 50 Key leading countries in APAC region for PCB market
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