Global PCB Industry Report, 2015-2020

Description: Global PCB Industry Report, 2015-2020 highlights the followings:

1. Global PCB Market and Status Quo of the Industry
2. Global Downstream Markets of PCB
3. Mobile Phone PCB Trends
4. Tablet PC/Laptop Computer/Automotive PCB Trends
5. Ranking of Global and Chinese PCB Vendors
6. Study of Major Global and Chinese PCB Vendors

Global PCB market was valued at USD57 billion in 2015, a 4.4% decline from 2014, largely due to: 1) depreciation of Japanese yen, euro, and NTD against the dollar; 2) stagnation in saturated mobile phone market, continuous decline in PC market, and a plunge in tablet PC market.

The sluggish demand from downstream markets has extended to 2016 and it is expected there will be no substitute for smartphone to drive PCB market until the year 2020. Global PCB industry is projected to keep shrinking in 2016 with a market size of USD55.3 billion (a 3.0% contraction).

Automotive PCB market is the biggest highlight. Global automotive PCB market size was USD5.28 billion in 2015 and is expected to grow by 8.3% to USD5.72 billion in 2016 and by 8.2% to USD6.19 billion in 2017, primarily because of impetus of millimeter-wave radar to RF board, of connected vehicle to multi-layer board, and of chassis electronization to metal substrate.

The biggest change in PCB industry in 2017 will be wider application of substrate like. According to Apple's suppliers, iPhone 7S/8 to be launched in 2017 will see some substantial upgradings in specification with substrate-like HDI replacing commonly-used HDI so as to massively import System in Package (SIP) technology with the aim of modularizing sub-system.

Compared with traditional HDI, the biggest change in the specification of substrate-like HDI is the line space/width on circuit board which moves toward fine pitch in order to work properly with SiP technology. Particularly, the line space/width must be miniaturized below 35 micrometers. In such case, traditional PCB HDI process cannot meet technical requirements on fine pitch, and large sums of money are needed to upgrade manufacturing equipment and re-explore production processes. By contrast, IC substrate vendors can easily produce such PCB, showing overwhelming superiority.

According to Apple's suppliers, for iPhone 7S/8 to be launched in 2017, the original one large traditional HDI board will be disassembled into four small substrate-like HDI boards, thus not only speeding up import of SiP technology but also freeing up more space for larger battery capacity.

Apple has asked suppliers to send samples in the third quarter, attracting IC substrate vendors including Ibiden, Kinsus, and Unimicron to scramble for orders. However, it now seems that Kinsus, a key SiP board supplier for Apple, has the best chance of winning substrate-like HDI order, and ASE Group is likely to grab SiP packaging & testing order.

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