

Global and China PCB (printed circuit board) Industry Report, 2010



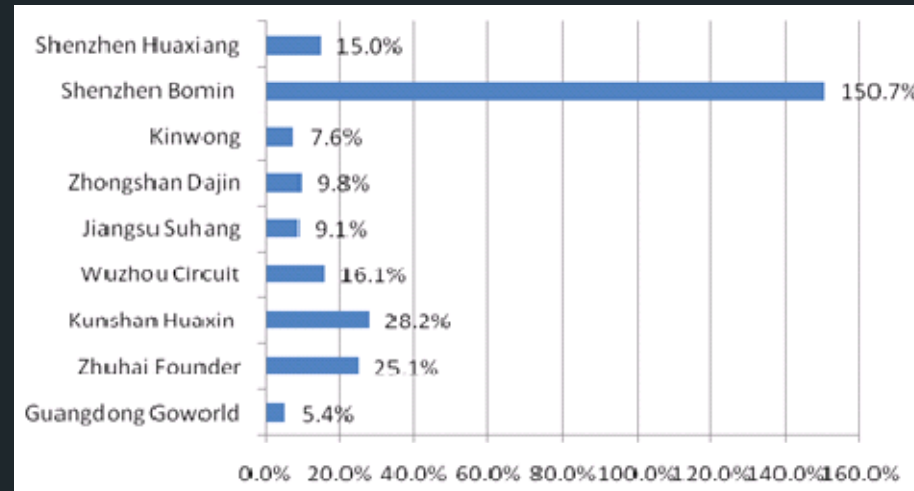
In 2009, the output value of the global PCB industry reached about US\$40.6 billion, down 15.83% over 2008. This was mainly caused by continuously decreasing PCB shipment and average prices. As for main sub-sectors, the output value of the global substrate, rigid PCB and flexible printed circuit (FPC) board sectors descended by 50%, 20% and 3.8% respectively compared with 2008. The decline of the global substrate and rigid PCB sectors is mainly due to the sharp drop of sales volume of desktops and medium to high-end notebooks. In comparison, the global FPC board sector declined more slightly in 2009, thanks to the growing number of LED backlight modules and Smart Phone FPC boards as well as the touch panel boom.

From 2000 to 2009, in terms of output value, computer, communications, industrial/medical, military and automotive PCBs decreased by 3%, 13.5%, 20.5%, 20.1% and 26.8% respectively, while consumer electronics PCB and package substrate increased by 15.8% and 68% respectively. Single-sided/double-sided PCB and multilayer PCB decreased by 37.3% and 25.2% respectively, while high-density interconnect (HDI) board, package substrate and FPC increased by 163.1%, 68.1% and 90.0% respectively.

In 2009, from the perspective of the global PCB distribution pattern, Mainland China, Japan and Taiwan were still the main production areas, South Korea continued to expand its PCB industry, while Europe and the United States were in recession. Compared with Japan and South Korea with advantages in high-end products such as IC substrate and FPC board, and Taiwan with advantages in mobile phone PCB, China, mainly engaged in single-sided PCB and multilayer PCB, is inferior in terms of the technical content of the PCB industry.

In 2009, China's PCB industry for the first time saw its output value decline slightly by 3.6% to US\$16.35 billion. Nevertheless, its share in the global PCB output value continued to rise. Among China's top 100 PCB enterprises in terms of sales revenue, local ones performed well, for example, the sales revenue of Bomin Electronic rose by 150.7% over 2008.

Sales Revenue Growth of Major Chinese PCB Enterprises, 2009



Source: ResearchInChina; China Printed Circuit Association

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