Global and China Advanced Rigid PCB Industry Report, 2012-2013

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

The report highlights the followings:

1. Recent developments of PCB Industry
2. Global and China Mobile PC Industry
3. Global and China Mobile Phone Industry
4. PCB Industry
5. 31 PCB Companies

The report only focuses on rigid PCB. In 2012, global PCB industry saw a jump in terms of output value, benefitting in a large part from the rapid growth in the shipment of Apple and Samsung, up 7.0% over 2011 to USD62.4 billion. It was not always the truth for the full-blown PCB industry. However, there is no such possibility of huge jump in 2013, and the expected growth rate will slow down to 2.7%. For most rigid PCB vendors, it was doomed for them to face revenue dive in 2012 unless both Samsung and Apple were included in their client lists, while in 2013 their revenue is likely to drop even if Apple is among the clients.

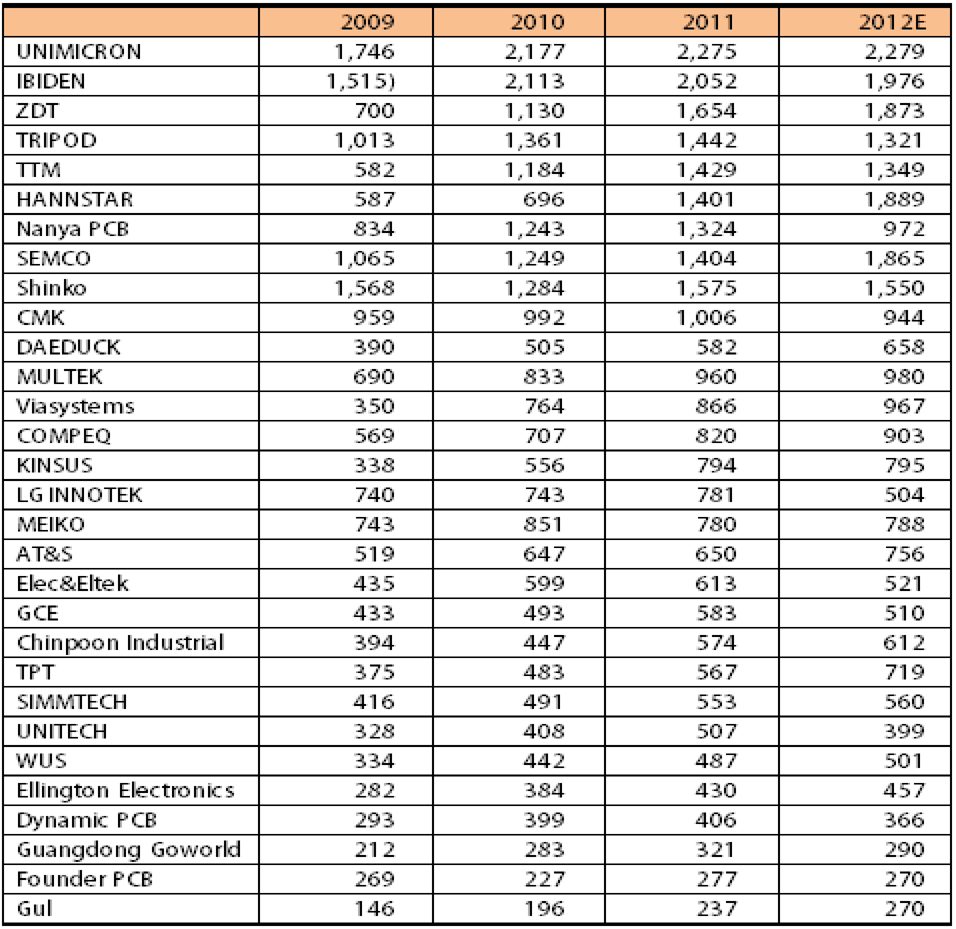
The big acquisition event in 2012 was Viasystems' takeover of America-based PCB producer DDI at a cost of USD267 million in June. In 2011, DDI's revenue reached USD263 million, and its net income hit USD25 million.

In 2012, two massive fire accidents took place in PCB industry. One happened in Apr. to the Changshu plant under Gold Circuit Electronics, the other was in Sep. with the sufferer coming to the Guangzhou plant under Viasystems. In Feb.2013, South Korean SIMMTECH was also on fire. PCB industry is vulnerable to fire accidents which break out twice annually at least. This leads to the natural reduction of capacity, balancing out the supply and demand.

In 2012, ZDT under Hon Hai Precision Ind. Co., Ltd. performed better, due to sizeable orders from Apple, the largest client. As a result, the revenue of ZDT witnessed huge jump, especially its revenue from flexible PCB. Hannstar PCB, as the world's largest notebook PCB vendor, saw a substantial surge in revenue following the fire accident inflicting Gold Circuit Electronics, its largest rival.

SEMCO saw big rise in orders thanks to its parent company Samsung which won considerable orders, and COMPEQ also did a good job due to the growing orders from the big client Apple. However, Nanya PCB dwarfed in this regard, since its failure to get orders from the big client Intel for one quarter long. And it was the same story for LG INNOTEK, the mobile phone shipment of whose big client LG presented a steep drop. As for counterparts in Mainland China, they leveled out in this regard.

Top 30 Rigid PCB Vendors Worldwide by Revenue, 2009-2012 (USD mln)



	2009	2010	2011	2012E
UNIMICRON	1,746	2,177	2,275	2,279
IBIDEN	1,515)	2,113	2,052	1,976
ZDT	700	1,130	1,654	1,873
TRIPOD	1,013	1,361	1,442	1,321
TTM	582	1,184	1,429	1,349
HANNSTAR	587	696	1,401	1,889
Nanya PCB	834	1,243	1,324	972
SEMCO	1,065	1,249	1,404	1,865
Shinko	1,568	1,284	1,575	1,550
CMK	959	992	1,006	944
DAEDUCK	390	505	582	658
MULTEK	690	833	960	980
Viasystems	350	764	866	967
COMPEQ	569	707	820	903
KINSUS	338	556	794	795
LG INNOTEK	740	743	781	504
MEIKO	743	851	780	788
AT&S	519	647	650	756
Elec&Eltek	435	599	613	521
GCE	433	493	583	510
Chinpoon Industrial	394	447	574	612
TPT	375	483	567	719
SIMMTECH	416	491	553	560
UNITECH	328	408	507	399
WUS	334	442	487	501
Ellington Electronics	282	384	430	457
Dynamic PCB	293	399	406	366
Guangdong Goworld	212	283	321	290
Founder PCB	269	227	277	270
Gul	146	196	237	270

source: RIC Global and China Advanced Rigid PCB Industry Report, 2012-2013

Table of contents

Selected Charts

- Output Value of PCB Industry, 2006-2013
- PCB Industry Chain
- Revenue of PCB Industry by Technology, 2009-2015E
- Revenue of Traditional PCB Products, 2012
- Revenue of Global PCB Industry by Region, 2000-2012
- Revenue of Global PCB Industry by Region, 2010-2012
- Revenue of Global PCB Industry by Application, 2010-2012
- Revenue of PCB Industry in Taiwan by Product, 2005-2011
- Revenue of PCB Industry in Taiwan by Product, 2005-2012
- Import/Export Value of Taiwan PCB Industry, 2000-2010
- Revenue of Taiwan PCB Industry by Application, 2009-2010
- Output Value of China PCB Industry, 2001-2012
- Revenue of Taiwanese PCB Vendors on Chinese Mainland by Product, 2004-2011
- Output Value of Taiwanese PCB Vendors on Chinese Mainland by Application, 2004-2010
- Quarterly Sales Volume of Laser Drilling Machine in Taiwan and Chinese Mainland, 2005Q3-2011Q3
- Investment Structure of PCB Companies in Mainland China, 2010-2011
- Output Value of PCB Industry in Mainland China by Technology, 2011-2012
- Revenue of European PCB Vendors by Country, 2010
- TOP 50 PCB Vendors in Europe, 2010
- Global Mobile Phone Shipment, 2007-2014E
- Global CDMA/WCDMA Mobile Phone Shipment by Region, 2010-2013
- Sales Volume of Major Mobile Phone Vendors Worldwide, 2011 vs.2012
- Sales Volume of Major Mobile Phone Vendors Worldwide, 2012Q4
- Market Share of Major Mobile Phone Vendors in South Korea, 2012Q4
- Market Share of Major Mobile Phone Vendors in America, 2012Q4

Selected Charts

- Sales Volume of Major Smartphone Vendors Worldwide, 2012 vs.2013
- Smartphone Operating System Distribution Worldwide, 2012Q4
- Mobile Phone Output of China by Province, Jan.-Nov., 2011
- Mobile Phone Output of China by Region, Nov.2012
- Monthly Mobile Phone Export Volume/Price of China, Jan.2011-Dec.2012
- Top 10 Mobile Phone Export Destinations of China, 2012
- Notebook Shipment by Brand, 2010-2013
- Market Share of Major Notebook Foundries, 2006 vs.2008
- Supporting Relationship between Notebook Brands and their Foundries and Shipment Proportion Worldwide, 2010
- Supporting Relationship between Notebook Brands and their Foundries and Shipment Proportion Worldwide, 2011
- Supporting Relationship between Notebook Brands and their Foundries and Shipment Proportion Worldwide, 2012 vs.2013
- Output of Major Tablet PC Vendors, 2012 vs.2013
- Output of Notebook Computer (Including Tablet PC) in China, 2004-2012
- Output of Notebook Computer (Including Tablet PC) in China by Region, 2010-2012
- Ranking of Mobile Phone PCB Vendors, 2010-2012
- Supply (%) of PCB for NOKIA Mobile Phone by Supplier, 2010-2011
- Supply (%) of PCB for SAMSUNG Mobile Phone by Supplier, 2010-2011
- Supply (%) of PCB for LG Mobile Phone by Supplier, 2010-2011
- Supply (%) of PCB for ZET Mobile Phone by Supplier, 2010-2011
- Supply (%) of PCB for RIM Mobile Phone by Supplier, 2010-2011
- Supply (%) of PCB for Apple Mobile Phone by Supplier, 2010-2011
- Market Share of Memory PCB Businesses, 2010-2012
- Market Share of Major PV Panel Businesses in China, 2006/2010/2011/2012
- Market Share of Automotive Electronic PCB Businesses, 2010-2012
- Market Share of Major Notebook PCB Vendors by Shipment, 2011-2012

Selected Charts

- Top 30 Rigid PCB Vendors Worldwide by Revenue, 2009-2012
- Revenue and Gross Margin of Unimicron, 2003-2013
- Quarterly Revenue and Gross Margin of Unimicron, 2011Q1-2012Q4
- Revenue of Unimicron by Product, 2010-2012
- Revenue of Unimicron by Application, 2010-2011
- Production Base Distribution of Unimicron
- M&A History of Unimicron
- Affiliated Holding Companies of Unimicron
- Financial Data of Major Subsidiaries under Unimicron, 2009-2011
- Revenue and Gross Margin of Compeq, 2006-2013
- Monthly Revenue and Growth Rate of Compeq, Jan.2011-Jan.2013
- Financial Data of Major Subsidiaries under Compeq, 2009-2011
- Affiliated Companies of Hannstar Broad PCB
- Revenue and Gross Margin of Hannstar Broad PCB, 2006-2013
- Monthly Revenue and Growth Rate of Hannstar Broad PCB, Jan.2011-Jan.2013
- Revenue of Hannstar Broad PCB by Application, 2009-2012
- Revenue of Hannstar Broad PCB by Layer, 2009-2012
- Financial Data of Major Subsidiaries under Hannstar Broad PCB, 2011
- Revenue and Gross Margin of Gold Circuit Electronics, 2005-2013
- Monthly Revenue and Growth Rate of Gold Circuit Electronics, Jan.2011-Jan.2013
- Revenue of Gold Circuit Electronics by Product, 2010-2012
- Revenue and Gross Margin of Tripod Technology, 2006-2013
- Monthly Revenue and Growth Rate ofTripod Technology, Jan.2011-Jan.2013
- Capacity of Tripod Technology, 2006-2011
- Revenue and Operating Margin of Meiko, FY2006-FY2013

Selected Charts

- Revenue and Operating Margin of Chinese Mainland Subsidiaries under Meiko, FY2009-FY2012
- Revenue of Meiko by Application, FY2010-FY2013
- Revenue of Meiko by Layer, FY2010-FY2013H1
- Revenue and Operating Margin of CMK, FY2005-FY2013
- Revenue of CMK by Application, FY2007-FY2015
- Revenue of CMK by Layer, FY2007-FY2013
- Revenue of CMK by Region, FY2007-FY2015
- Revenue and Output of WUXI CMK, 2003-2010
- Revenue and Operating Margin of IBIDEN, FY2006-FY2013Q3
- Revenue of IBIDEN by Business, FY2006-FY2013Q3
- Operating Profit of IBIDEN by Business, FY2009-FY2013
- HDI Output of IBIDEN, 2008-2012
- Revenue of IBIDEN, 2007-2011
- Revenue and Operating Margin of GDS, 2005-2013
- Revenue of GDS by Business, 2009-2013
- Revenue and Operating Margin of GDS, 2005-2013
- Revenue of GDS by Business, 2010-2013
- Revenue and Operating Profit of TTM, 2004-2008
- Revenue and Operating Margin of TTM, 2005-2012
- Revenue of TTM by Application, 2008-2012
- Revenue of TTM by Region, 2008-2012
- Revenue and Gross Margin of Unitech PCB, 2006-2013
- Monthly Revenue and Growth Rate of Unitech PCB, Jan.2011-Jan.2013
- Technology Roadmap of Rigid PCB
- Technology Roadmap of Flexible/Rigid PCB

Selected Charts

- Revenue and EBITDA of AT&S, FY2006-FY2013
- Worldwide Bases under AT&S
- Revenue of Bases under AT&S by Product, 2011
- Capacities of Bases under AT&S, 2011
- Output Value of AT&S by Region, FY2006-FY2012
- Revenue of AT&S by Region, FY2011-FY2013
- Revenue of AT&S by Application, FY2009-FY2013
- Organization of Kingboard
- Revenue and Profit Margin Attributable to Shareholders of Kingboard, 2002-2012
- Revenue of Kingboard by Business, 2008-2012
- Organization of Elec&Eltek
- Revenue and Operating Margin of Elec&Eltek, 2005-2011
- Revenue of Elec&Eltek by Region, 2006-2011
- Revenue of Elec&Eltek by Layer, 2006-2011
- Capacity of Plants under Elec&Eltek, Late 2010
- Technology Capability of Elec&Eltek
- Multi-Layer Board Output of Express Electronics, 2004-2009
- Double-Sided Board Output of Express Electronics, 2004-2009
- Processing Capability of Express Electronics, 2010
- Revenue and Operating Margin of SIMMTECH, 2004-2013
- Revenue and Operating Margin of SIMMTECH, 2010Q1-2012Q4
- Revenue of SIMM TECH by Product, 2012Q1-2013Q4
- Revenue of SIMM TECH Substrate by Product, 2012Q1-2013Q4
- Client Distribution of SIMMTECH, 2004-2010
- Plants under SIMMTECH

Selected Charts

- Revenue and Gross Margin of T.P.T, 2005-2013
- Monthly Revenue and Growth Rate of T.P.T, Jan.2011-Jan.2013
- Client Structure of T.P.T, 2012
- Revenue of T.P.T by Application, 2012
- Capacity of Plants under T.P.T, 2007-2011
- Equity Structure of Ellington Electronics
- Revenue and Gross Margin of Ellington Electronics, 2007-2011
- Output of Ellington Electronics, 2007-2012Q2
- Revenue of Ellington Electronics by Layer, 2009-2012H1
- Revenue of Ellington Electronics by Layer, 2001-2010
- Revenue of Ellington Electronics by Application, 2007-2010Q3
- Revenue of Ellington Electronics by Application, 2009-2012H1
- Revenue of Ellington Electronics by Region, 2007-2010Q3
- Revenue of Ellington Electronics by Region, 2009-2012H1
- Revenue of Ellington Electronics by Client, 2007-2012
- Revenue and Gross Margin of Chin-Poon Industrial, 2005-2013
- Monthly Revenue and Growth Rate of Chin-Poon Industrial, Jan.2011-Jan.2013
- Monthly Capacity of Plants under Chin-Poon Industrial,2007-2010
- Revenue and Operating Margin of LG INNOTEK, 2006-2013
- Revenue and Operating Margin of LG INNOTEK, 2011Q1-2012Q4
- Revenue of LG INNOTEK by Business, 2011-2013
- Operating Profit of LG INNOTEK by Business, 2011-2013
- Revenue of LG INNOTEK by Business, 2011Q4-2012Q4
- Revenue of SEMCO by Division, 2010-2013
- Operating Profit of SEMCO by Division, 2010-2013

Selected Charts

- Revenue and Operating Profit of SEMCO ACI Business Division, 2011Q1-2012Q4
- Revenue of SEMCO ACI Business Division by Product, 2011Q1-2012Q4
- Revenue and Operating Margin of Founder PCB, 2007-2012
- PCB Downstream Application of Founder PCB, 2010
- Capacity of Chongqing Plant under Founder PCB by Technology
- Capacity of No.1 Plant under Zhuhai Founder PCB by Technology
- Capacity of No.3 Plant under Zhuhai Founder PCB by Technology
- Capacity of No.5 Plant under Zhuhai Founder PCB by Technology
- Capacity of No.2 Plant under Hangzhou Founder PCB by Technology
- Capacity of No.4 Plant under Zhuhai Founder PCB by Technology
- HDI Technology Capability of Founder PCB
- Revenue and Operating Profit of Gul Technologies, 2005-2012
- Affiliated Businesses of Gul Technologies
- Revenue and Gross Margin of Dynamic PCB, 2006-2013
- Monthly Revenue and Growth Rate of Dynamic PCB, Jan.2011-Jan.2013
- Capacity of Dynamic PCB, 2009-2012
- Revenue and Operating Margin of Viasystems, 2006-2013
- Revenue of Viasystems by Business, 2008-2012
- Global Distribution of Viasystems
- Revenue of Viasystems by Application, 2008-2011
- Major Clients of Viasystems, 2008-2011
- Major Clients of Viasystems
- Revenue of Viasystems, 2010-2012
- Distribution of DDI by Region and Terminal Market
- Plants Distribution Of DDI

Selected Charts

- Major Clients of DDI
- Revenue and Gross Margin of Nanya PCB, 2006-2012
- Monthly Revenue and Growth Rate of Nanya PCB, JAN.2011-JAN.2013
- Capacity and Global Distribution of Nanya PCB
- Client Structure of Nanya PCB, 2010
- Technology Capabilities of Shennan Circuit
- Revenue and Operating Margin of WUS Electronics, 2007-2009
- Shipment of Wus Electronics by Layer, 2007-2009
- Revenue of Wus Electronics, 2007-2009
- Revenue of Wus Electronics by Application, 2007-2011
- Major Clients of WUS Electronics
- Revenue and Operating Margin of Guangdong Goworld, 2005-2012
- Organization of Guangdong Goworld
- Revenue of Guangdong Goworld by Business, 2007-2012
- Output of Guangdong Goworld, 2007-2011
- Organization OF ZDT
- Global Distribution of ZDT
- Revenue and Operating Margin of ZDT, 2008-2013
- Workforce of ZDT, 2006-Late Jan.2011
- Monthly Revenue and Growth Rate of ZDT, Nov.2011-Jan.2013
- Technology Roadmap of Multek ELIC, 2011-2013
- Technology Roadmap of Flexible/ Rigid PCB of Multek, 2011-2013
- Technology Roadmap of Multek Microvias, 2011-2013
- Revenue and Gross Margin of Kinsus, 2003-2013
- Monthly Revenue and Growth Rate of Kinsus, Jan.2011-Jan.2013

Selected Charts

- Revenue of Kinsus by Product, 2011-2012
- Revenue of Kinsus by Application, 2011
- Revenue and Net Income of Shinko, FY2007-FY2013
- Revenue of Shinko By Business, FY2011-FY2012

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