



Global and China FPCB(Flexible Printed Circuit Board)Industry Report,2013-2014

Feb. 2014

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 global FPCB market valued USD11.321 billion with the YoY growth rate of 9.4% in 2013, and will be worth USD12.008 billion in 2014 and USD12.686 billion in 2015.

FPCB is mainly used in display (LCD Panel and Touch screen), computing (HDD and ODD) and communication (mobile phones). In 2013, the FPCB applied to the computer field occupied 25%, of which 80% was dominated by Japanese companies; however, this market is gradually shrinking.

In the field of mobile phones and tablet PCs, only the vendors such as Samsung, Apple, LG, Sony, HTC and Nokia who have high quality requirements like to adopt FPCB, while other ones may replace FPCB with FFC or common connectors. The FPCB purchase amount of Samsung and Apple is equivalent to over 50% of the global FPCB market.

In 2013, the most significant change of the FPCB industry lied in the slumping profit margin of veterans and the soaring profit margin of new entrants. Veterans lagged behind new entrants in equipment and technical R & D strength. After a high starting point and early difficulties,

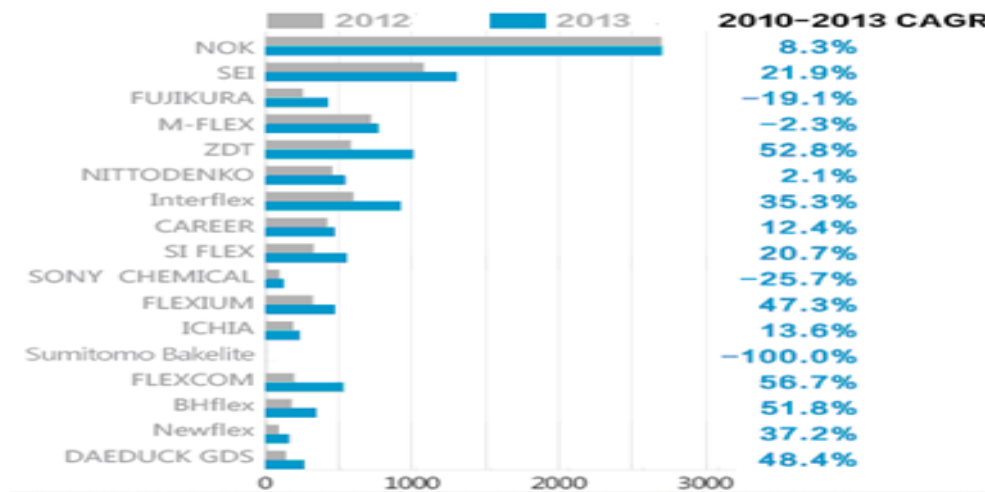
new entrants witnessed a significant increase in profit margin. In addition, the production bases of veterans were mostly located in Mainland China, where RMB appreciation and rising labor costs led to the substantial fall of profits.

The world's largest FPCB company Mektron suffered its first loss since the establishment, because of three main reasons: First, HDD and ODD markets contracted; second, Mektron began to intervene in the price war; third, Mektron's 45% output came from China where RMB appreciation and rising labor costs eroded profits. Mektron has increased the capacity in Taiwan, and Panasonic has also invested USD100 million in building a new FPCB base in Taiwan.

The gross margin of South Korea's largest FPCB company Interflex fell by nearly 50% in 2013, and its operating margin plummeted from 6.2% to 1.2%. The only FPCB company in the United States ----- MFLEX whose manufacturing bases were in Mainland China also faced loss for the first time. Fast-growing companies such as Flexcom and BHflex transferred their main production bases to Vietnam.

Hon Hai Group's ZDT obtained more orders from Apple with the advantages of the parent company, so that its profit margin went up substantially. ZDT's main base is located in Shenzhen, but it has also transferred part of its bases to low-cost regions: its second base settles down in Qinhuangdao, and the third base is in Huai'an.

Revenue of Major Global FPCB Enterprises, 2013 (USD mln)



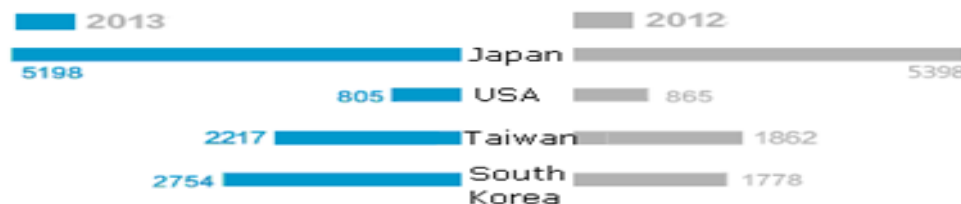
Veterans witnessed slumping profit margin in 2013. Interflex's gross margin in 2013 dropped by

50%

New entrants saw soaring profit margin in 2013. The profit margin of Flexcom in 2013 jumped by

34%

Global FPCB Revenue by Region, 2012-2013 (USD mln)



Japan maintained a dominant position, and will see the share of

40%

in the next 5-10 years

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