



Global and China FPCB (Flexible Printed Circuit Board) Industry Report, 2014-2015

Mar. 2015

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

Global and China FPCB Industry Report, 2014-2015 involves the following:

1. Analysis on the FPCB Industry
2. Analysis on the FPCB Downstream Market
3. Comparison between FPCB Companies
4. Research on 22 Typical FPCB Companies and 9 FPCB Upstream Companies

2014 was a bumper year for most FPCB companies, and the output value of the entire PCB industry reached USD12.5 billion, rising by 10.5% from the previous year. In 2015, the prices of bulk commodities (particularly the copper price) plummet, which will greatly reduce the raw material costs of PCB companies and help raise their profitability. Larger screen size of mobile phone requires larger FPCB. The FPCB market is expected to grow 8.6% in 2015 as the smartphone market can not continue its rapid growth and the tablet PC is in recession.

In 2014, the euro, the NTD and the yen significantly devalued, while the South Korean won appreciated, which not only hit a serious blow to the competitiveness of South Korean FPCB enterprises, but minified the profit of South Korean PCB enterprises.

Revenue of Major Global FPCB Companies, 2010-2014

(USD mln)	2010	2011	2012	2013	2014
NOK	2071	2314	3064	2630	3367
SEI	700	927	1222	1268	1278
FUJIKURA	777	601	288	412	637
M-FLEX	803	831	815	750	632
ZDT	274	528	658	978	1566
NITTO DENKO	496	513	518	528	692
Interflex	362	460	677	905	609
CAREER	321	394	475	456	531
SI Flex	306	345	372	538	495
FLEXIUM	144	260	366	460	430
Ichia	152	211	213	231	339
Sumitomo Bakelite	214	188			
Flexcom	134	155	219	516	252
BHflex	96	133	201	346	305
Newflex	60	54	102	123	143
Daeduck GDS	78	121	156	255	208
Xiamen Hongxin		30	60	108	150
MFS	80	92	90	106	130

The revenue and profit margin of all South Korean PCB companies declined, for example, Flexcom's revenue slumped by more than 50%, the giant Interflex's revenue dropped 33% and its operating margin turned to be the negative 14.2%, which showed the power of the currency war.

Benefiting from the currency depreciation, Taiwanese and European companies witnessed soaring profit margins. More than half of Japanese companies did not benefit from the depreciation of the yen because they set up production bases overseas, but still better than South Korean companies.

In the downstream market, the biggest change in 2014 lied in: HDD saw the first growth after three consecutive years of decline. The global HDD shipment amounted to 564 million units, an increase of 2.4% from 2013. Previously, insiders were optimistic about the prospect of SSD instead of HDD; but actually, the SSD price remained high, the tablet PC market decayed, while the laptop computer market recovered to growth after three consecutive years of downturn. At the same time, the development of SSD did not restrict HDD; the new network economy and the big data era stimulated the demand for servers and HDD. HDD will still be the mainstream in the next three to five years, and the HDD shipment is expected to reach 621 million units in 2019. Japanese companies focusing on HDD-use FPCB performed exceedingly well in 2014, for example, the leader NOK (Mektron) achieved the revenue growth rate of 28% and the operating margin of 8.7% (rising from the negative 10.6%), Nitto's revenue surged by 31%.

The competitiveness of South Korean and American companies weakened significantly. The strong USD made MFLEX's revenue fall dramatically. The depreciation of NTD facilitated Taiwanese companies to grow by leaps and bounds; meanwhile, Apple greatly reduced orders from South Korean companies, while placed more orders with Japanese and Taiwanese companies in accordance with the principle of the nearest supply. The revenue of ZDT under Foxconn soared 60% in 2014.

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