

Global and China Rigid PCB Industry Report, 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.

Global Top 40 Rigid PCB Companies by Revenue, 2012-2014 (USD mln)

		2012	2013	2014
TRIPOD	Taiwan	1326	1377	1388
TTM	USA	1349	1368	1398
Compeq	Taiwan	783	1051	1158
Viasystems	USA	967	1008	1028
Hannstar board	Taiwan	1112	976	958
Unimicron	Taiwan	1049	889	918
ZDT	Taiwan	908	871	850
Kingboard PCB	China HK	935	860	830
MEIKO	Japan	759	818	860
AT&S	Austria	698	780	838
CMK	Japan	908	730	750
SEMCO	South Korea	792	676	680
Chin Poon Industry	South Korea	595	658	738
WUS Group	Taiwan	644	658	650
T.P.T	Taiwan	722	650	750
MULTEK	USA	650	610	608
Gold Circuit Electronics	Taiwan	509	600	608
IBIDEN	Japan	455	580	630
Unitech PCB	Taiwan	433	480	478
ISU PETASYS	South Korea	390	450	508
HITACHI CHEMICAL	Japan	494	430	420
Shennan Circuits	China Mainland	345	423	451
Ellington	ChinaMainland	440	419	426
LG INNOTEK	South Korea	408	390	392
Founder Technology PCB	China Mainland	366	378	380
Dynamic Electronics	Taiwan	372	370	372
NANYA PCB	Taiwan	350	360	378
KYODEN	Japan	386	322	325
DAEDUCK GDS	South Korea	350	320	330
KYOCERA Circuit	Japan	412	350	420
REDBOARD	China HK	290	340	380
Wuzhou Group	China Mainland	270	296	308
DAP	South Korea	295	290	270
DAEDUCK ELECTRONICS	South Korea	280	290	270
Shirai Denshi	Japan	281	260	260
CCTC	China Mainland	286	277	270
Gul Technologies	Singapore	267	261	230

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Abstract

Global and China Rigid PCB Industry Report, 2014-2015 highlights the followings:

1. PCB industry
2. PCB downstream market
3. Horizontal comparison of PCB companies
4. 35 typical PCB companies

2014 was a good year for majority of PCB companies, as output value of PCB industry touched USD59.6 billion, rising 3.7% against 2013, the fastest growth rate since 2011. Looking forward to 2015, a collapse in prices of commodities, especially in that of copper, will significantly reduce raw materials costs of PCB companies, thus further driving their profit margins.

In 2014, in key regions of PCB manufacturing, euro, NTD, and yen all depreciated sharply, while the won appreciated, dealing a heavy blow to South Korean PCB industry and cutting profit margins of the country's PCB companies, which all suffered declines in revenue and profit margins, no exception for Samsung's SEMCO, whose revenue from PCB business glided 2.4%, revenue from IC Carrier business dropped by 19%, and operating margin fell to below 1% from about 9%.

Taiwanese companies and European ones, benefiting from currency devaluation, saw a surge in profit margins, while Japanese peers didn't gain from yen depreciation, as more than half of their production bases are located in foreign countries, but still performed better than South Korean counterparts.

HDI was still a main engine of growth in rigid PCB field in 2014, and is expected to maintain the momentum in 2015. As mobile phone screens become larger, PCB for mobile phone has to react accordingly. To ensure light weight and thinness of mobile phone, the demand for more advanced Anylayer HDI increases tremendously. As Anylayer HDI technology is time- and -capacity consuming, combined with Panasonic's withdrawal from Anylayer HDI field, various PCB companies will expand Anylayer HDI capacity in 2015. In 2014, the company registered largest growth in revenue from HDI PCB business was Taiwanese Compeq, which boasts customers like Apple and Xiaomi with impressive performance, jumping by 28.3% to USD690 million, one step away from industry leader Unimicron.

Another spotlight in 2014 was PCB for server. With further penetration of internet economy, the coming of big data era, and influx of large amounts of capital into network economy, the demand for server ushers in explosive growth. PCB for server requires high Tg and low Loss, with layer growing more higher, up to 28, driving continuous increase in unit price of PCB for server since 2009. The companies that specialize in PCB for server, such as Taiwanese WUS Printed Circuit and ACCL, accomplished good results, with WUS Printed Circuit's revenue ascending by 20% and ACCL's 27%.

Regarding rigid PCB, LED lighting stimulated demand for metal PCB with good heat elimination performance. Taiwanese T.P.T, GIA TZOONG, and mainland Chinese Shenzhen Kinwong Electronic, which are skilled in metal PCB, all enjoyed a decent level of growth. In addition, PCB for automobile also did a good performance.

The most sensational event in PCB industry in 2014 was the merger of TTM and Viasystems. The combined company is absolutely No. 1 manufacturer with total revenue approximating USD2.5 billion. TTM enjoys a strong position in cellular phone and networking/telecom, and Viasystems in automotive and industrial fields, showing a perfect complementation.

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