Global and China Copper Clad Laminate (CCL) Industry Report, 2016-2020

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

Copper clad laminate (CCL) is made up of copper foil, glass fiber, resin and other materials. As the essential material for fabricating PCB, CCL is chiefly divided into rigid and flexible CCL.

The global CCL output was 750 million square meters in 2015, down 0.9% year on year, mainly due to the decline in growth rate of the downstream market. In 2016, the rising raw material costs bring greater pressure on the development of the downstream sectors, and the market has not yet shown a sign of obvious recovery. For this, the global output is expected to continue to drop a bit by 0.4%.

China, the world's largest CCL production base, produced 520 million square meters in 2015, edging up 0.3% year on year and accounting for 69.6% of the global total. In 2016-2020, China's CCL output is expected to grow at a compound annual rate of about 1.5% thanks to the slight rebounding of the downstream PCB industry under the impetus of automotive electronics, 4G / 5G communication terminals and other high-growth fields over the next few years.

In 2016, China's CCL price stops falling to rise by about 2.5% as a result of the more expensive copper foil which is much sought after. It will take 1-2 years to build the copper foil capacity, so the market will still be in short supply in the next two years, thereby promoting the CCL price to go high.

The Chinese CCL market is highly concentrated, with the stable competitive landscape. In 2015, the industry’s CR5 was 73.0%, wherein Kingboard Chemical ranked first with 27.5% market share, followed closely by Nan Ya Plastics Corporation and Shengyi Technology with 15.5% each.

The CCL industry mainly relies on the PCB market whose future development will be propelled by automotive electronics, communications terminals and other emerging high-growth fields in China.

Automotive electronics: As per the cost structure, new energy vehicles see automotive electronics hold a much higher proportion of the total costs than traditional cars (compact cars witness 15%, medium and high-end sedans 28%, hybrid sedans 47%, and battery electric sedans 65%). In recent years, with the support of the national policies, China's new energy vehicle industry has been developing quickly at an average annual growth rate of 50.0%, which can facilitate automotive electronics further.
Communications terminals: The number of Chinese 4G users swelled from 97 million in 2014 to 386 million in 2015, showing explosive growth. The market growth rate in 2016 is expected to exceed that in 2015. 4G (or above) intelligent terminal module hardware needs to be integrated in PCB for the purpose of wireless reception, transmission and other functions. Accordingly, the future upgrading of intelligent terminals will prompt the demand for PCB to grow.

Global and China Copper Clad Laminate Industry Report, 2016-2020 by ResearchInChina focuses on the followings:
- Overview, market size, market structure, competitive landscape, etc. of the global CCL industry;
- Policies, development trends, market scale, market structure, market price, competition pattern, import and export, etc. of China CCL industry;
- Overview, market size, market structure, competitive landscape, driving factors and the like of the upstream copper foil industry;
- Downstream PCB market size, market structure, competitive landscape, market drivers and so on;
- Operation, CCL Business, etc. of 5 global and 18 Chinese CCL manufacturers.

Market Structure of Copper Clad Laminate in China, 2015

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# Overview of CCL Industry

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