

2009香港及華南地區 綫路板市場調查報告

10th Anniversary
HKPCA
2000-2010

2010 年版 香港綫路板協會
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2010 Edition

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HKPCA
Hong Kong Printed Circuit Association
香港綫路板協會

HKPCA

**HONG KONG & SOUTH CHINA
PCB MARKET SURVEY REPORT**

(BRIEF ONLY)

SEPTEMBER 2009

HKPCA
Hong Kong Printed Circuit Association
香港綫路板協會

PCB Market in HK & South China

Distribution of Plants

	Total in South China	# East China	^ Others outside S.& E. China	Total
No. of Plants	57	9	4	70
No. of Employees	95,880	7,587	3,734	107,201
Sales Revenue (M USD)	3,793	259.9	119.2	4,172
Output Value per Capita (USD)	39,547	34,256	31,923	38,907

East China includes Jiangsu and Shanghai

^ Areas other than South and East China include Hunan, Jiangxi, Xian, Chongqing and overseas

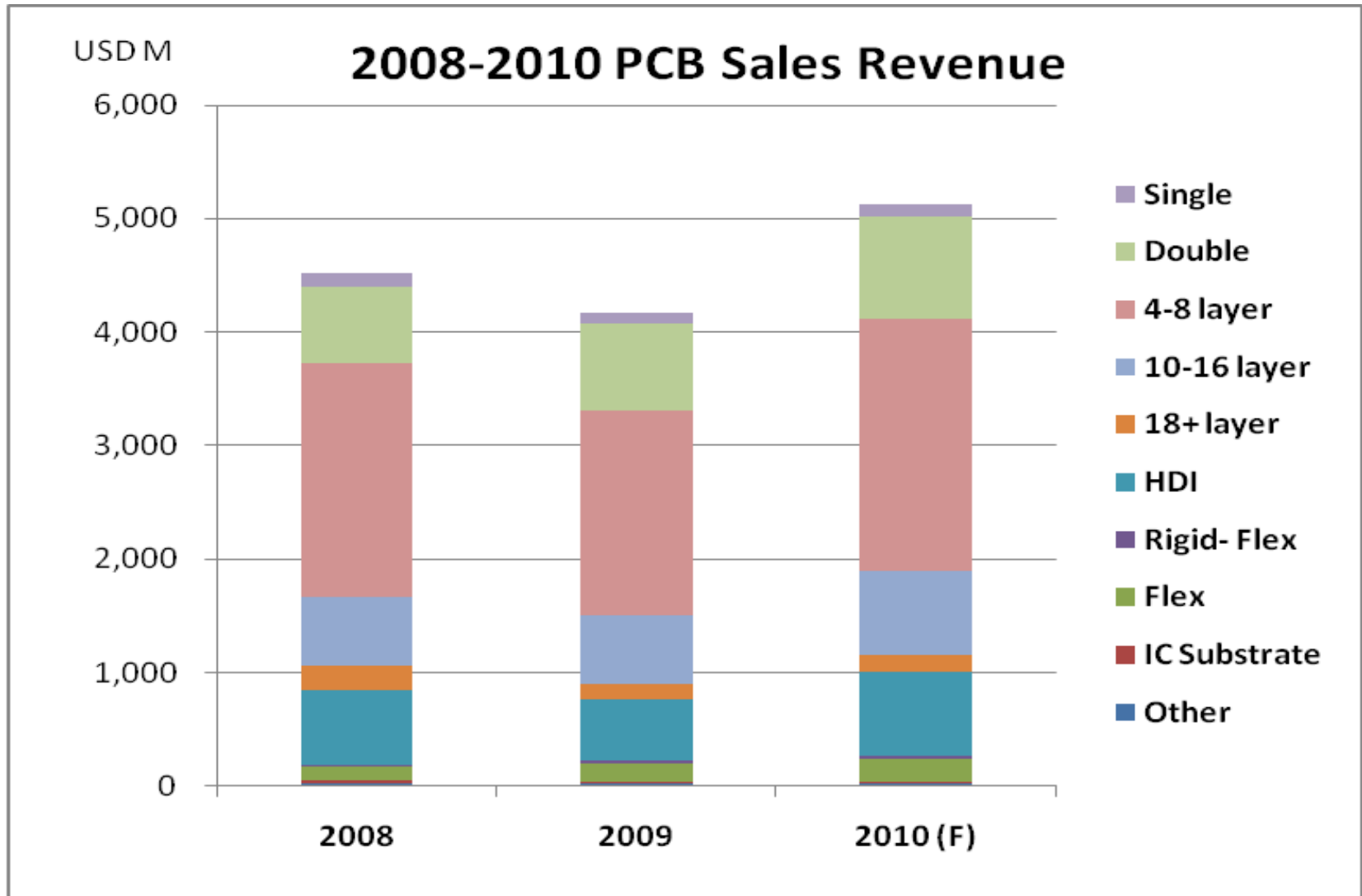
PCB Market in HK & South China

Sales Revenue of Respondents

(M USD)	Single	Double	4-8 layer	10-16 layer	18+ layer	HDI	IC Substrate	Rigid-flex	Flexible	Others	Total
2008	123	675	2059	609	216	652	24	13	129	25	4525
	(2.7%)	(14.9%)	(45.5%)	(13.5%)	(4.8%)	(14.4%)	(0.5%)	(0.3%)	(2.9%)	(0.6%)	(100.0%)
2009	99	768	1805	597	132	546	16	20	165	24	4172
	(2.4%)	(18.4%)	(43.3%)	(14.3%)	(3.2%)	(13.1%)	(0.4%)	(0.5%)	(4.0%)	(0.6%)	(100.0%)
2010 (F)	109	906	2213	741	153	740	16	23	200	25	5126
	(2.1%)	(17.7%)	(43.2%)	(14.5%)	(3.0%)	(14.4%)	(0.3%)	(0.4%)	(3.9%)	(0.5%)	(100.0%)
2009 Growth Rate	-19.0%	13.8%	-12.3%	-2.0%	-39.0%	-16.1%	-34.6%	50.8%	27.9%	-6.7%	-7.8%
2010 Growth Rate (F)	9.9%	18.0%	22.6%	24.1%	15.9%	35.5%	1.9%	15.8%	20.8%	3.8%	22.9%

- Based on survey of 37 PCB manufacturers, revenue in USD Million
- () Data in blanket stand for market share of corresponding product

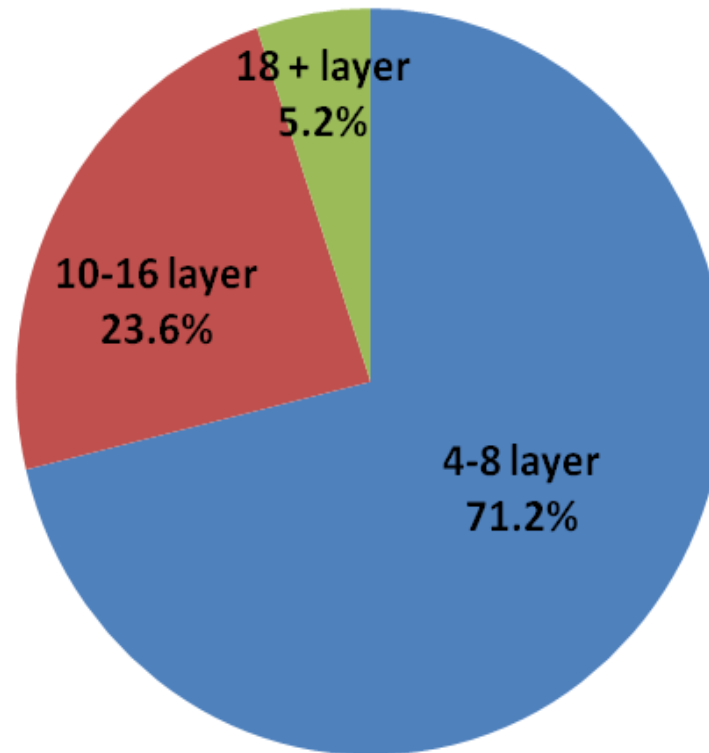
PCB Market in HK & South China



Source: 2009 HKPCA Market Survey

PCB Market in HK & South China

**2009 Multilayer PCB Distribution
(by sales revenue)**



Total Sales Revenue: USD2,534M

Source: 2009 HKPCA Market Survey

PCB Market in HK & South China

PCB Application of Respondents

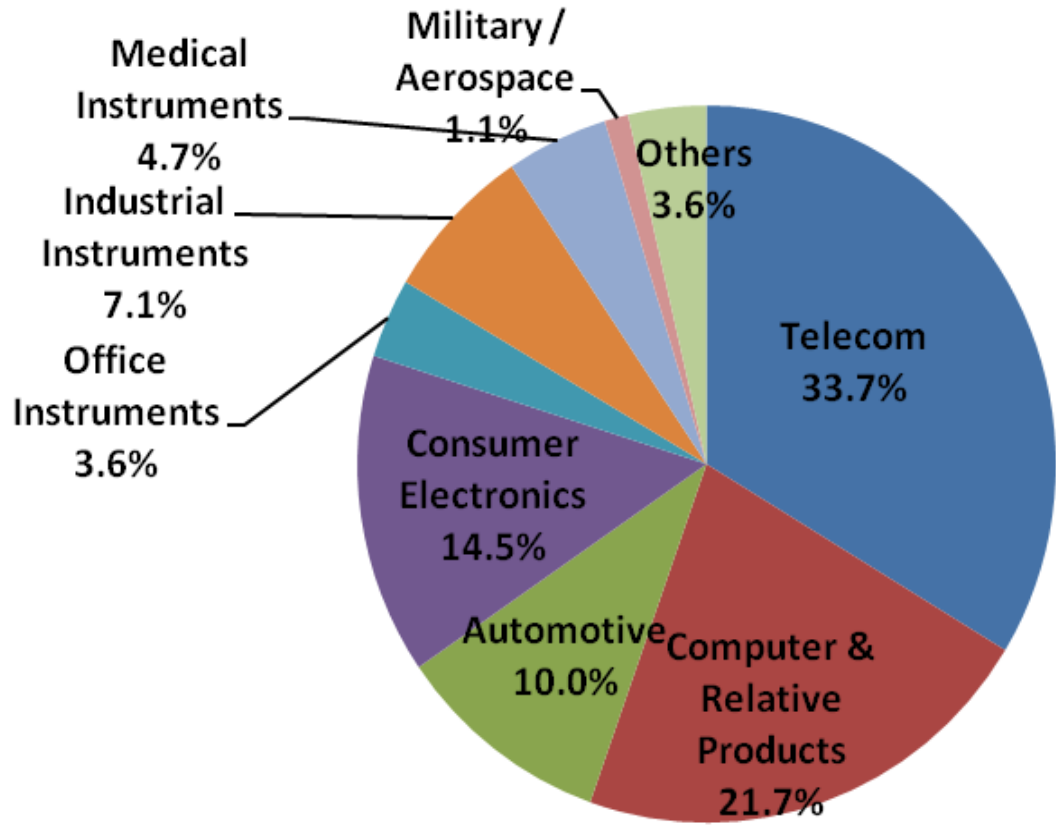
(M USD)	Communicatio n	Computer	Automotive	Consumer electronics	Office Equipment	Industrial Control	Medical	Military/ Aerospace	Others	Total
2008	1,659	936	525	589	129	345	86	77	181	4,525
	(36.7%)	(20.7%)	(11.6%)	(13.0%)	(2.8%)	(7.6%)	(1.9%)	(1.7%)	(4.0%)	(100.0%)
2009	1,409	905	418	604	149	297	194	48	149	4,172
	(33.8%)	(21.7%)	(10.0%)	(14.5%)	(3.6%)	(7.1%)	(4.7%)	(1.1%)	(3.6%)	(100.0%)
2010 (F)	1,722	1,107	588	748	170	348	247	54	142	5,126
	(33.6%)	(21.6%)	(11.5%)	(14.6%)	(3.3%)	(6.8%)	(4.8%)	(1.1%)	(2.8%)	(100.0%)
2009 Growth rate	-15.1%	-3.4%	-20.3%	2.5%	15.7%	-14.0%	126.8%	-37.7%	-17.6%	-7.8%
2010 Growth Rate (F)	22.3%	22.4%	40.5%	23.9%	14.1%	17.3%	27.4%	13.2%	-4.8%	22.9%

Source: 2009 HKPCA Market Survey

香港綫路板協會

PCB Market in HK & South China

2009 PCB Application Analysis

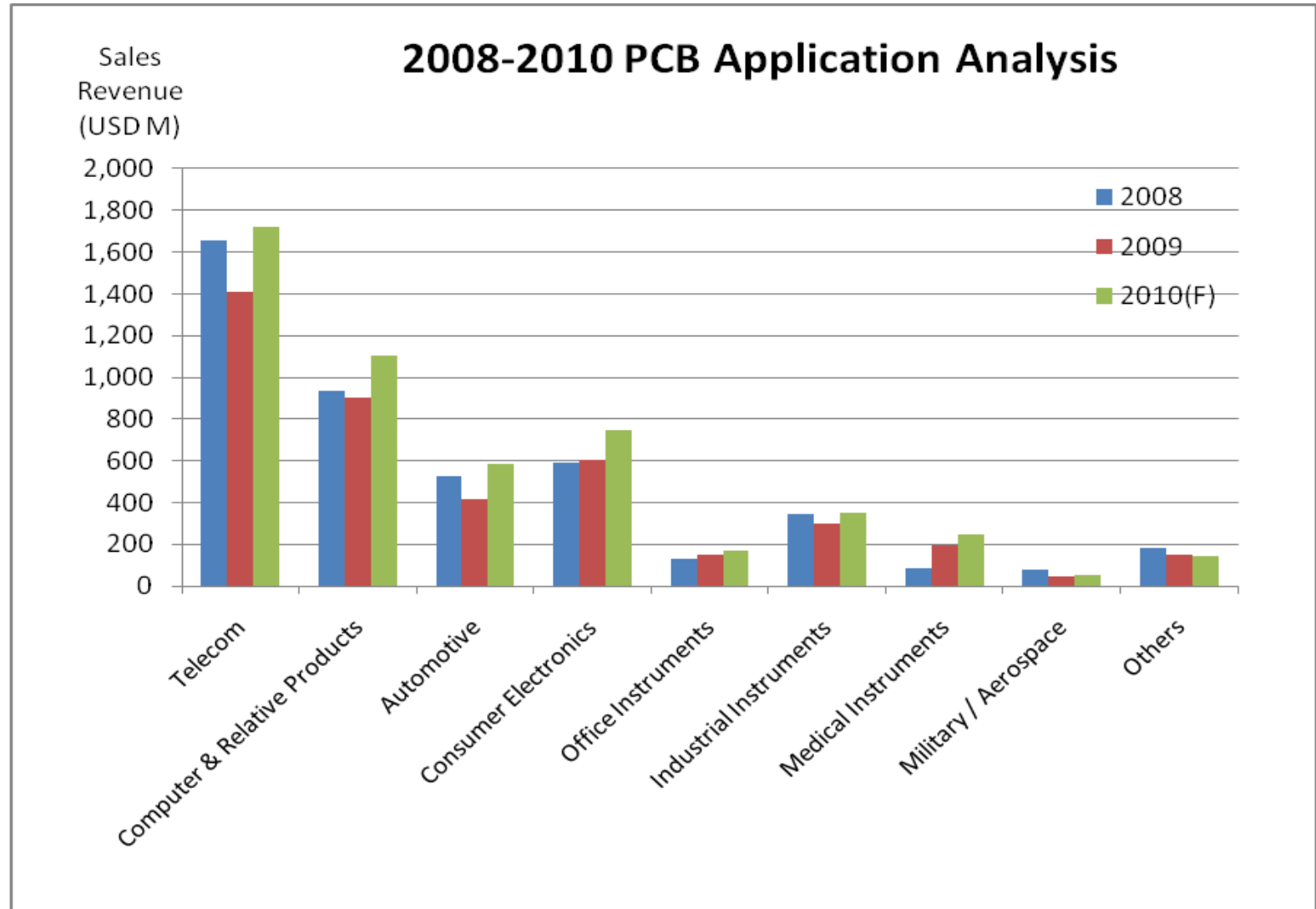


Sales Revenue: USD 4,172M

Source: 2009 HKPCA Market Survey



PCB Market in HK & South China



Source: 2009 HKPCA Market Survey

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