

DKN Research Newsletter

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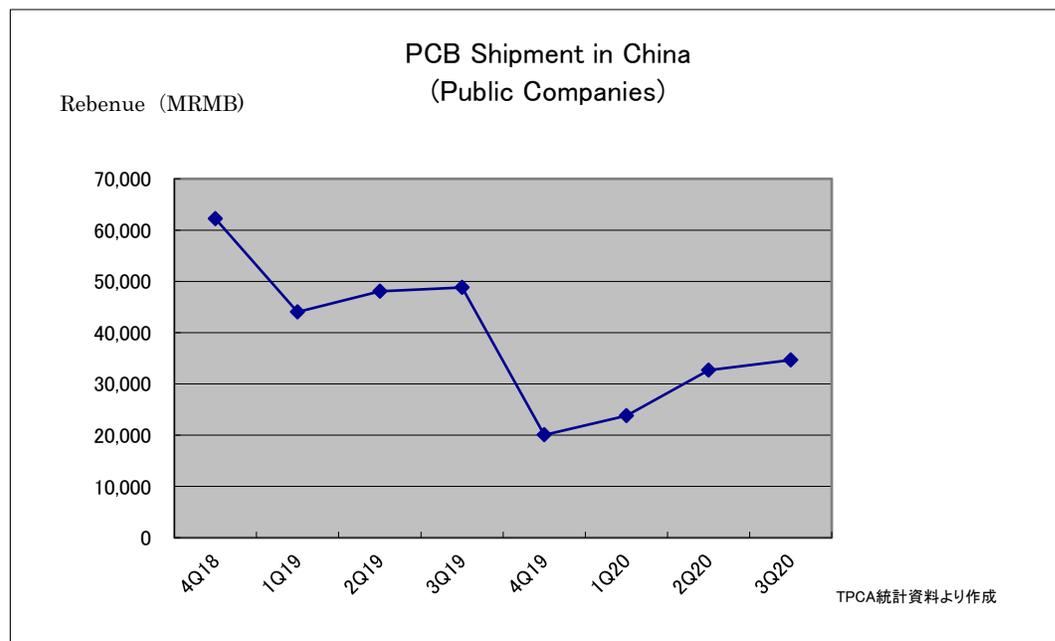
(Micro Electronics & Packaging)

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Printed Circuit Industry in China

Market data provided by the Taiwan Printed Circuit Association (TPCA) is very comprehensive. It includes revenue from PCB manufacturers as well as affiliated industries such as copper laminates and equipment. Digitimes is a daily newspaper for semiconductor, electronics, computer and communications industries in Taiwan and China that I reference to help me analyze global electronic market trends. Taiwan is the manufacturing center for electronic products and using the above mentioned sources we can view performance monthly and sometimes weekly. I receive instant notification for any headline news from the industry.

Communication is valuable. A few weeks ago a fire broke out at a PCB factory in Taoyuan and I viewed the story instantly. Unfortunately, any news or data from the PCB industry in China is not easily accessible. The media is not very transparent when releasing news. Revenue and sales are not reported in a timely manner so market performance and forecasting is difficult to review or discuss. Recently, the TPCA provided market data from the Chinese PCB industry. The graph pasted below is quarterly revenue from publicly traded PCB manufacturers:



Revenue declined considerably during 4th quarter last year; since then, it increased every quarter during 2020. The graph includes 22 companies that report quarterly data. A market analyst told me that there could be over one thousand PCB manufacturers in China, so the graph pasted above is extremely limited and does not encompass much of the industry. Not even sure if this data is better than nothing.

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Headlines of the week

(Please contact dnumakura@dknresearch.com for further information and news.)

1. EE Times Japan (Industry media in Japan) 11/9
LCD panels are still major in smartphones. But they have been moving to OLED panels quickly.
2. TPCA (Taiwan Printed Circuit Association) 11/11
October shipment of Taiwanese printed circuit manufacturers: 64.46 billion NT\$.
3.46% increase from previous month, 0.22% increase from the same month of the previous year.
3. TDK (Major device manufacturer in Japan) 11/11
Has rolled out a series of film capacitors “ModCap” for power modules. Capacitance: ~2525microF, Size: 243 x 169.5 x 90 mm. Operating temp: 90C.
4. SWCC (Major cable manufacturer in Japan) 11/12
Has started a field test of the super conductive three phase coaxial cable in Yokohama Plant. It will reduce the power loss more than 95%.
5. Fujitsu (Major electronics company in Japan) 11/13
Has unveiled a new technology of 3D display with Auto Stereoscopic 3D technology. The customer can enjoy the 3D image without goggles.
6. JPCA (Industry organization in Japan) 11/15

September shipment in Japan: 409.5 billion yens, 15.6% increase from previous month, 7.4% increase from same month of previous year. Strong build-up boards. Weak Flex circuits.

7. Kyushu University (Japan) 11/16

Has developed a set of organic EL materials combining carbazole and boron. They have sharp spectrum for wide range of visible lights.

8. Tokyo Institute of Technology (Japan) 11/18

Has co-developed a new manufacturing process for single crystal GaN substrate. It is valuable to make power semiconductor substrates.

9. NIMS (Major R&D organization in Japan) 11/20

Has developed a heat resistant MEMS magnetic sensor on diamond substrate. A thin film layer of Fe₈₁Ga₁₉ was generated on single crystal diamond.

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