Trends in the Global Electronics and PCB Industry

ICT Christmas Seminar
Harrogate
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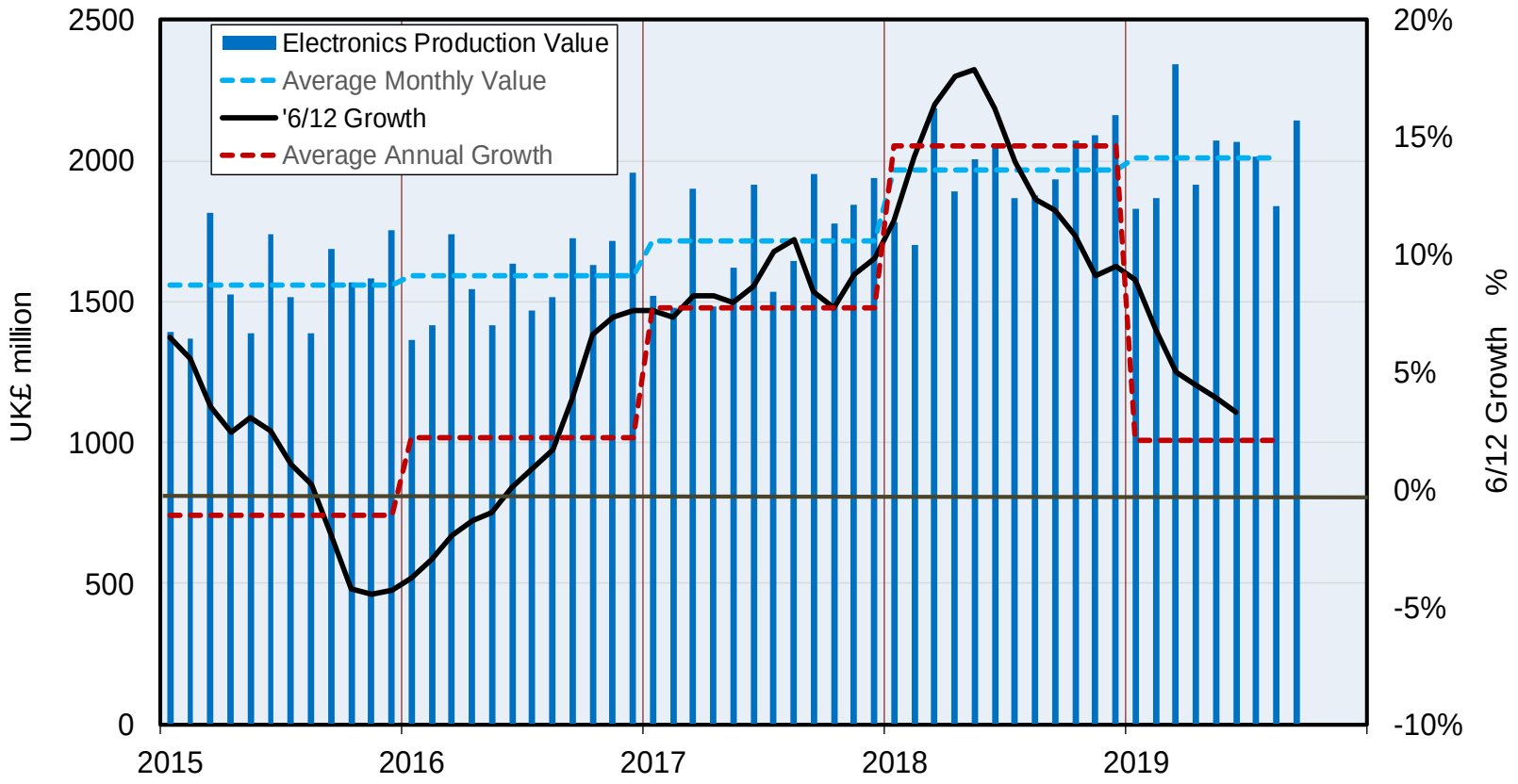
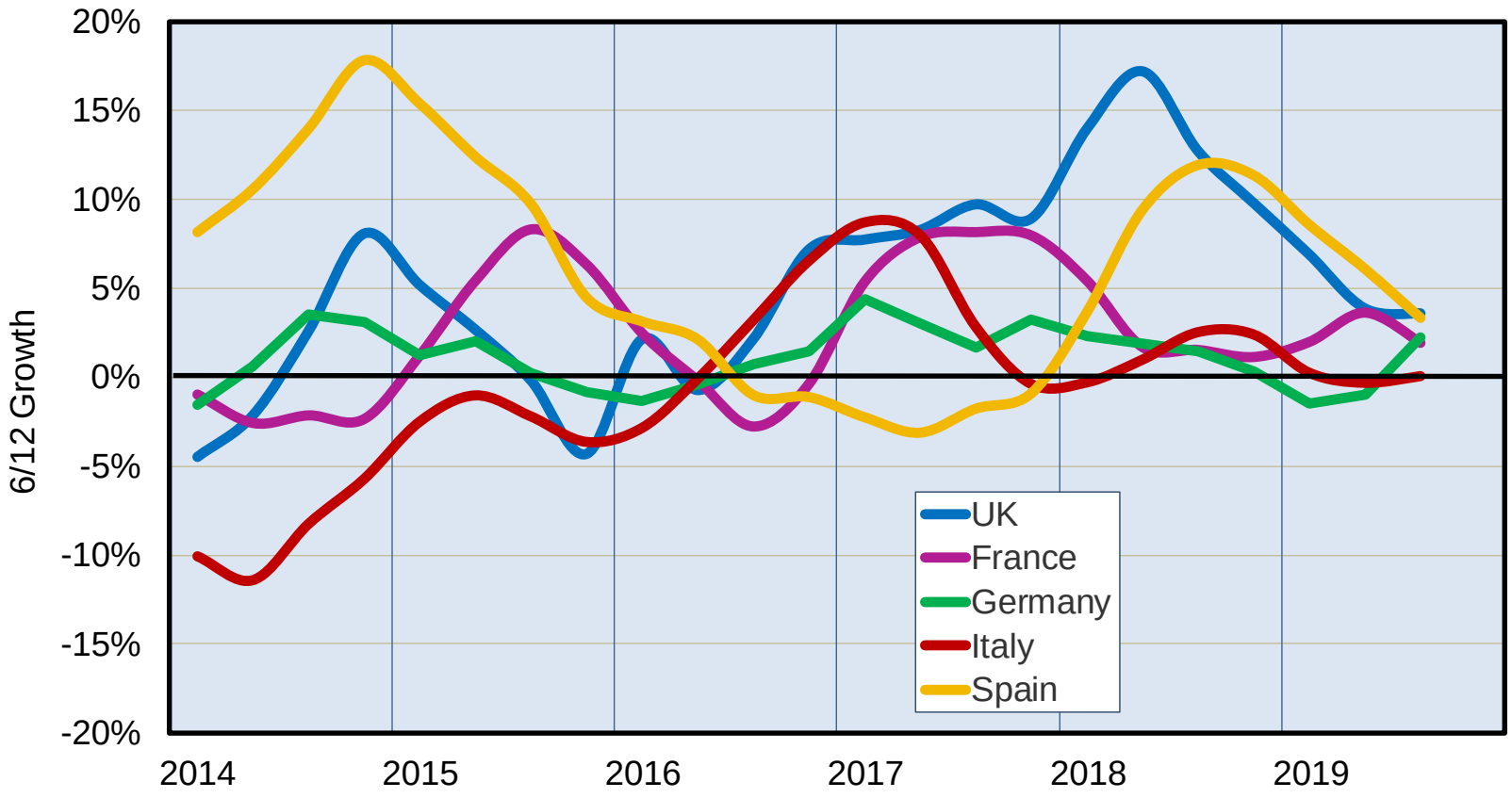
Electronics Production Trends
(market for PCBs)

UK Electronics Production Growth (6/12)



W European Electronics Production Growth (6/12)



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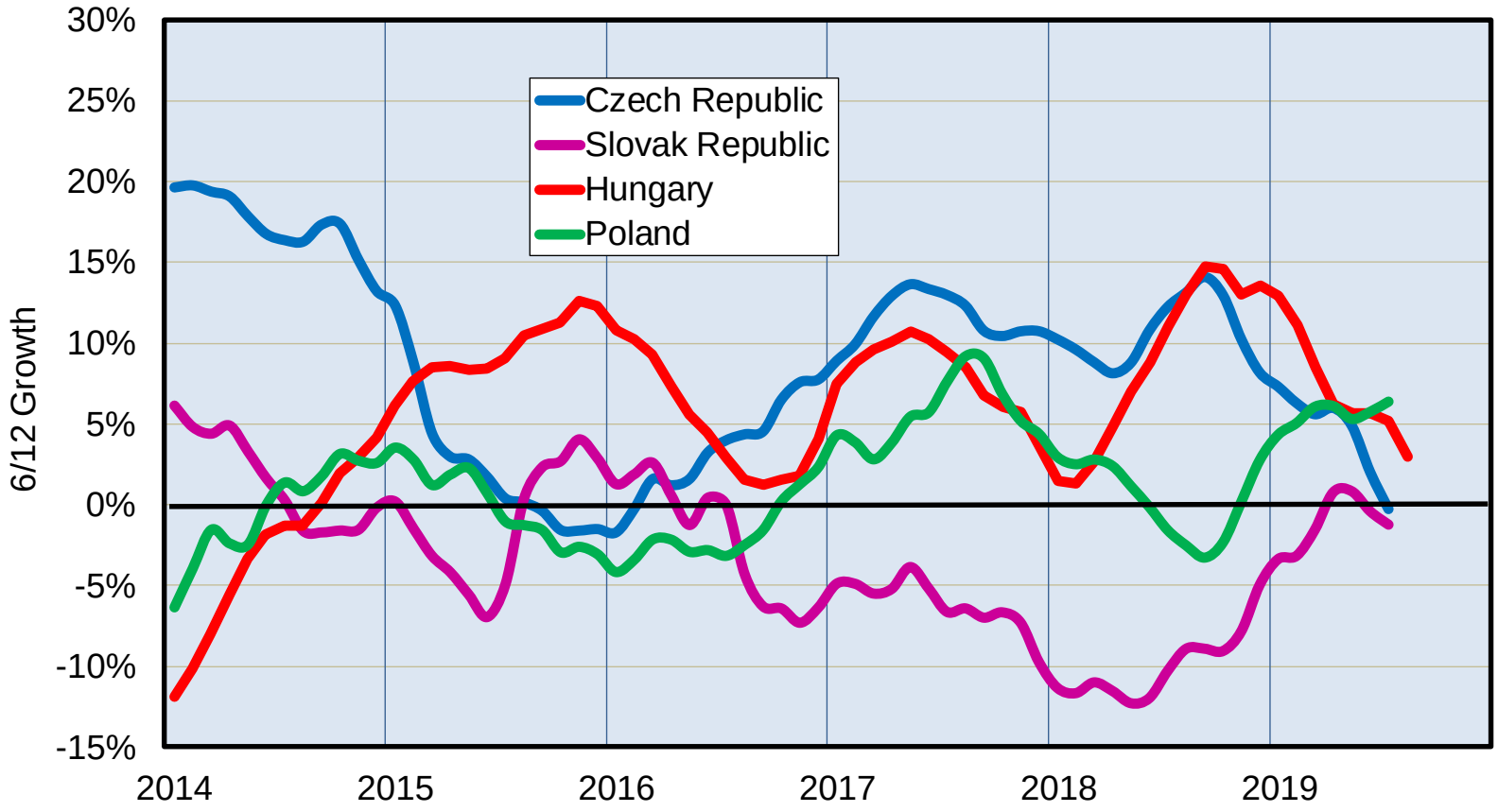
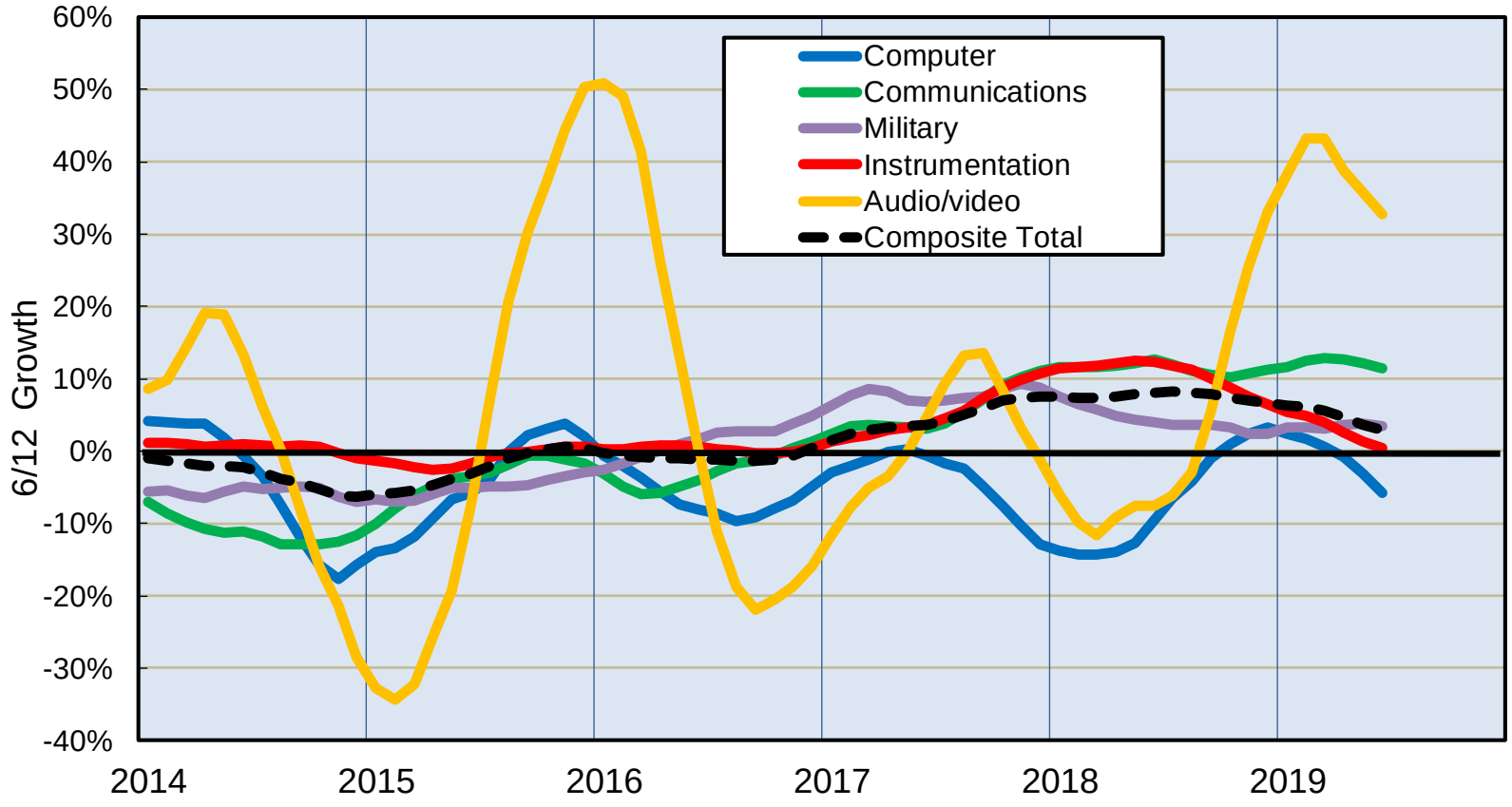
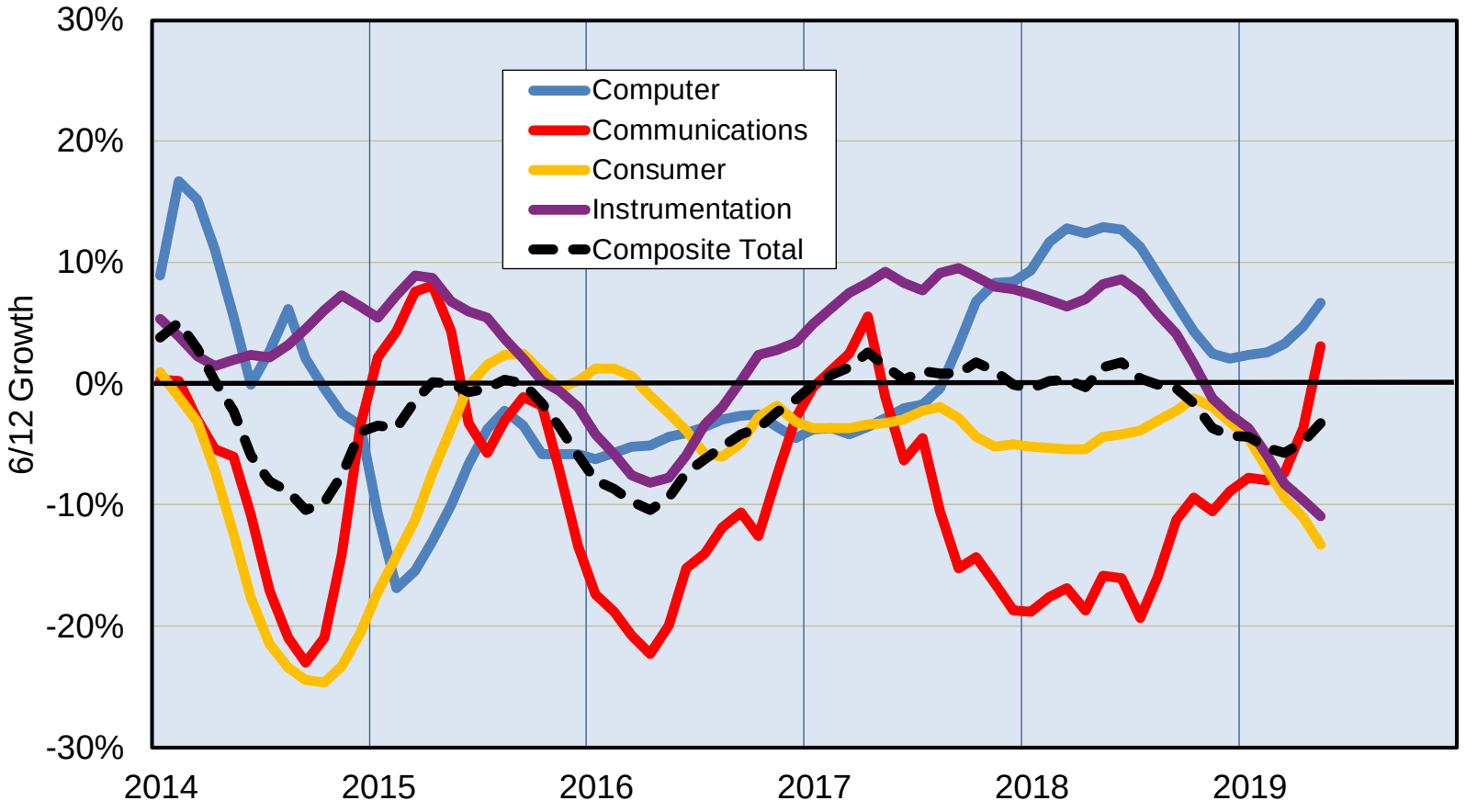


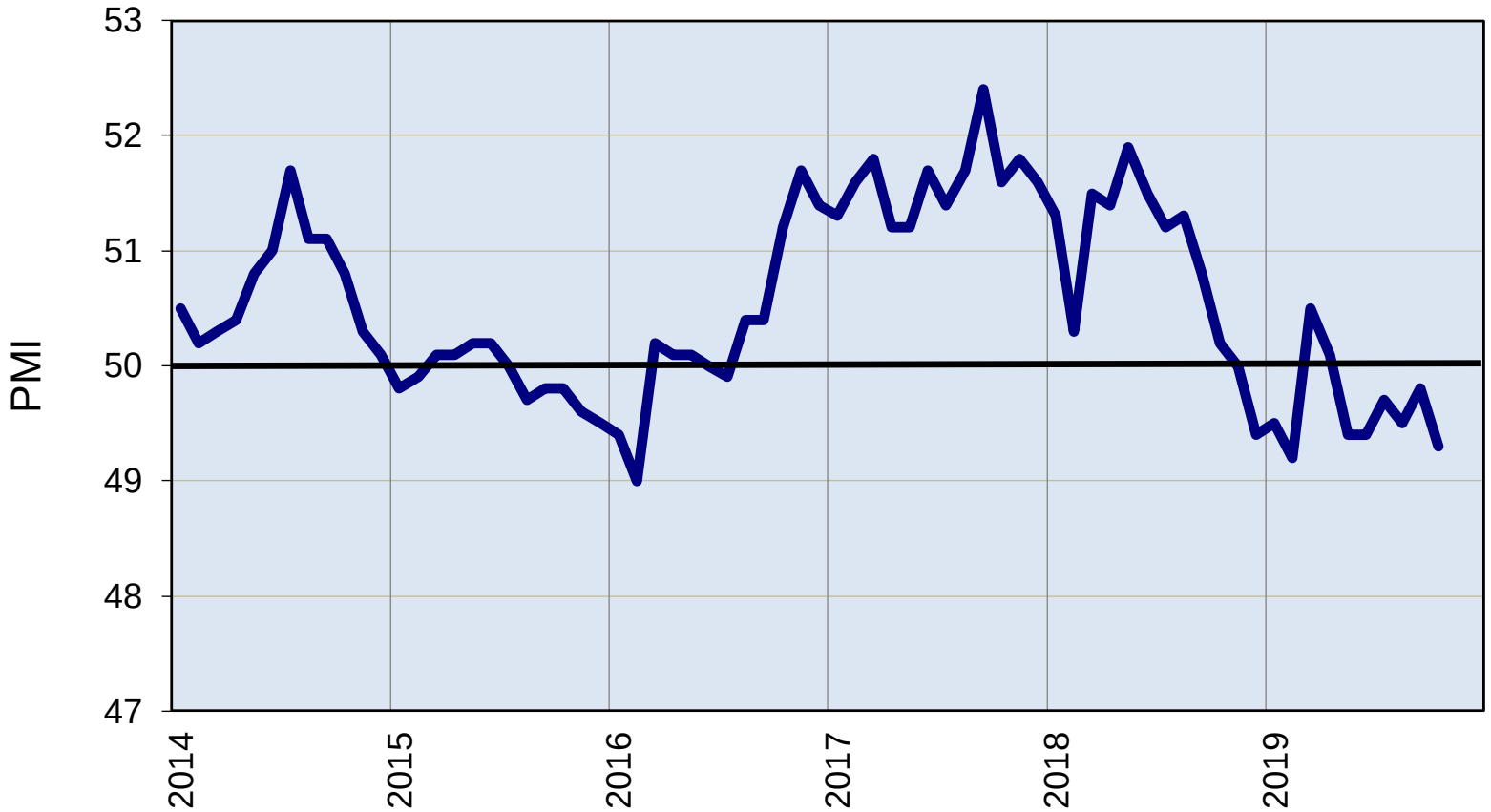
USA Electronics Production Growth (6/12)



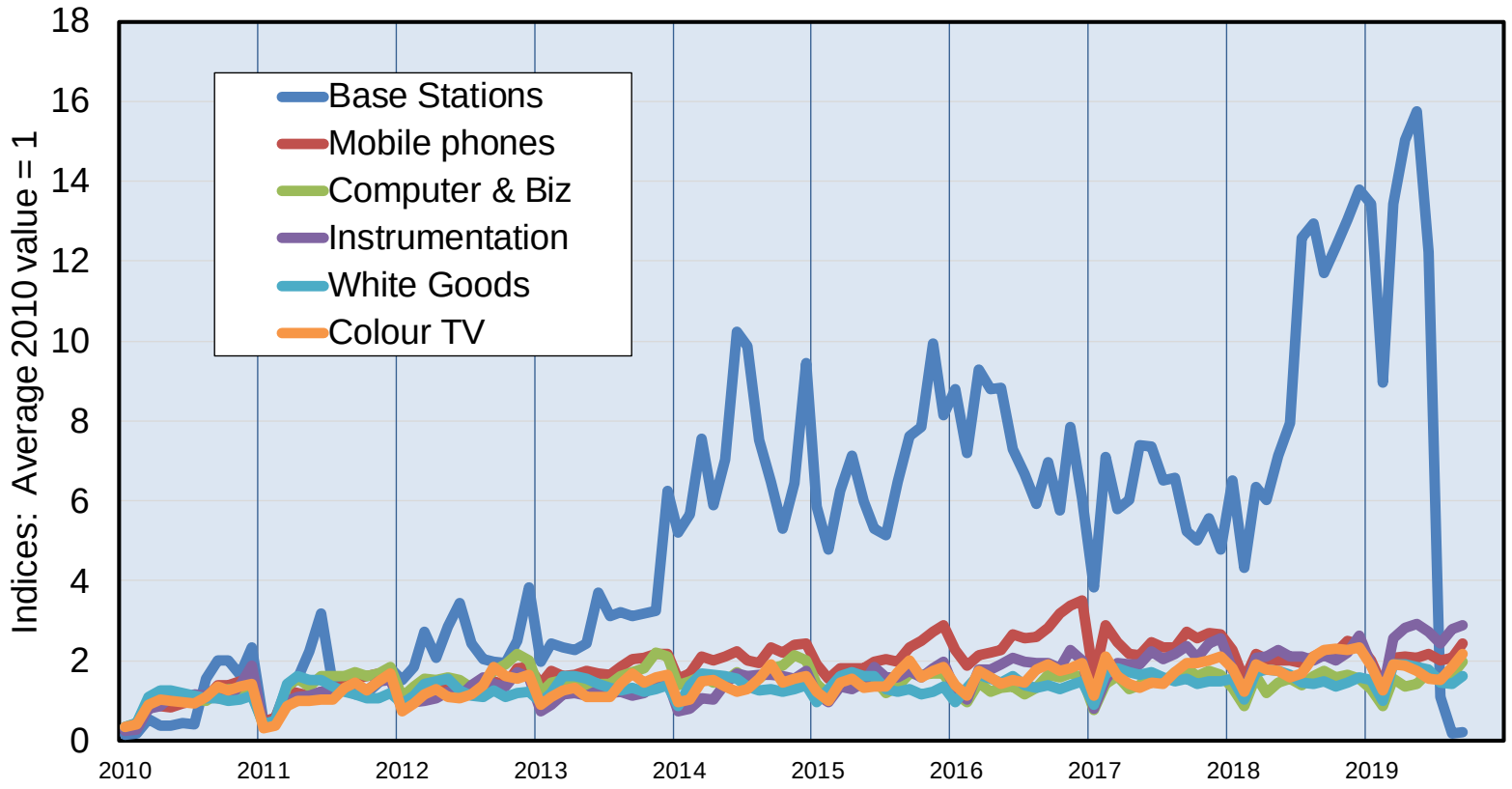
Japan Electronics Production



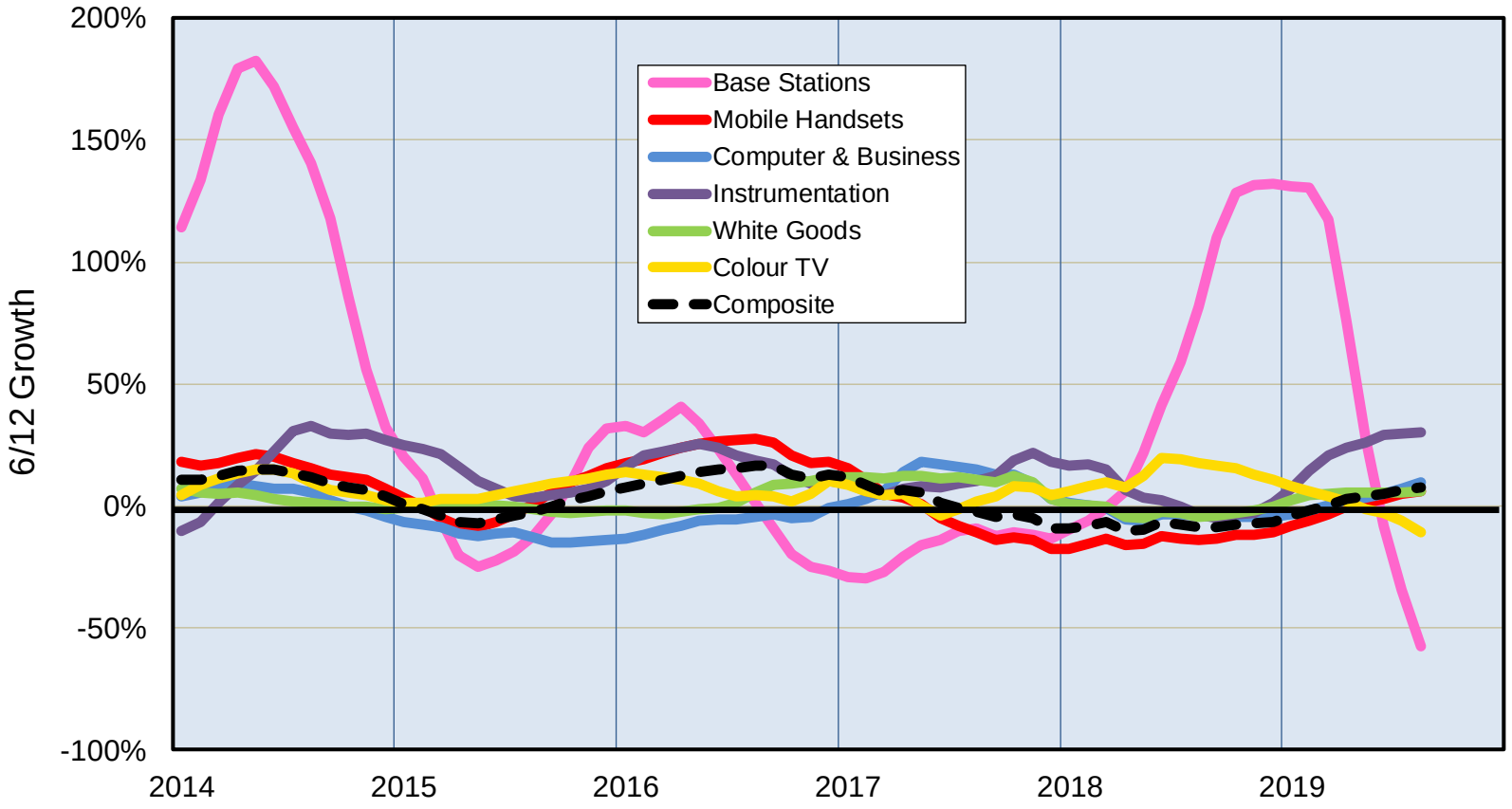
China Manufacturing PMI



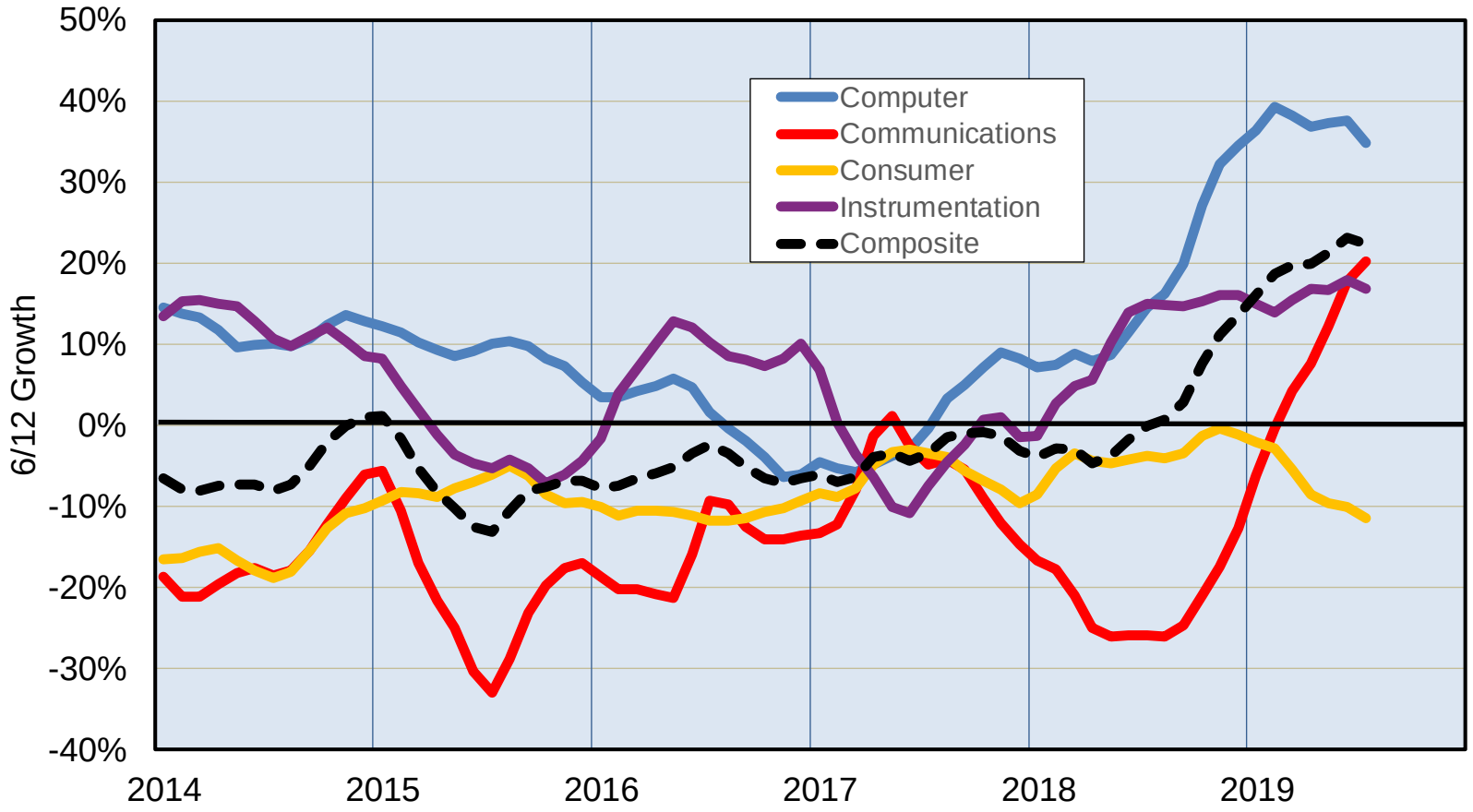
China Electronics Output (6/12 Growth)



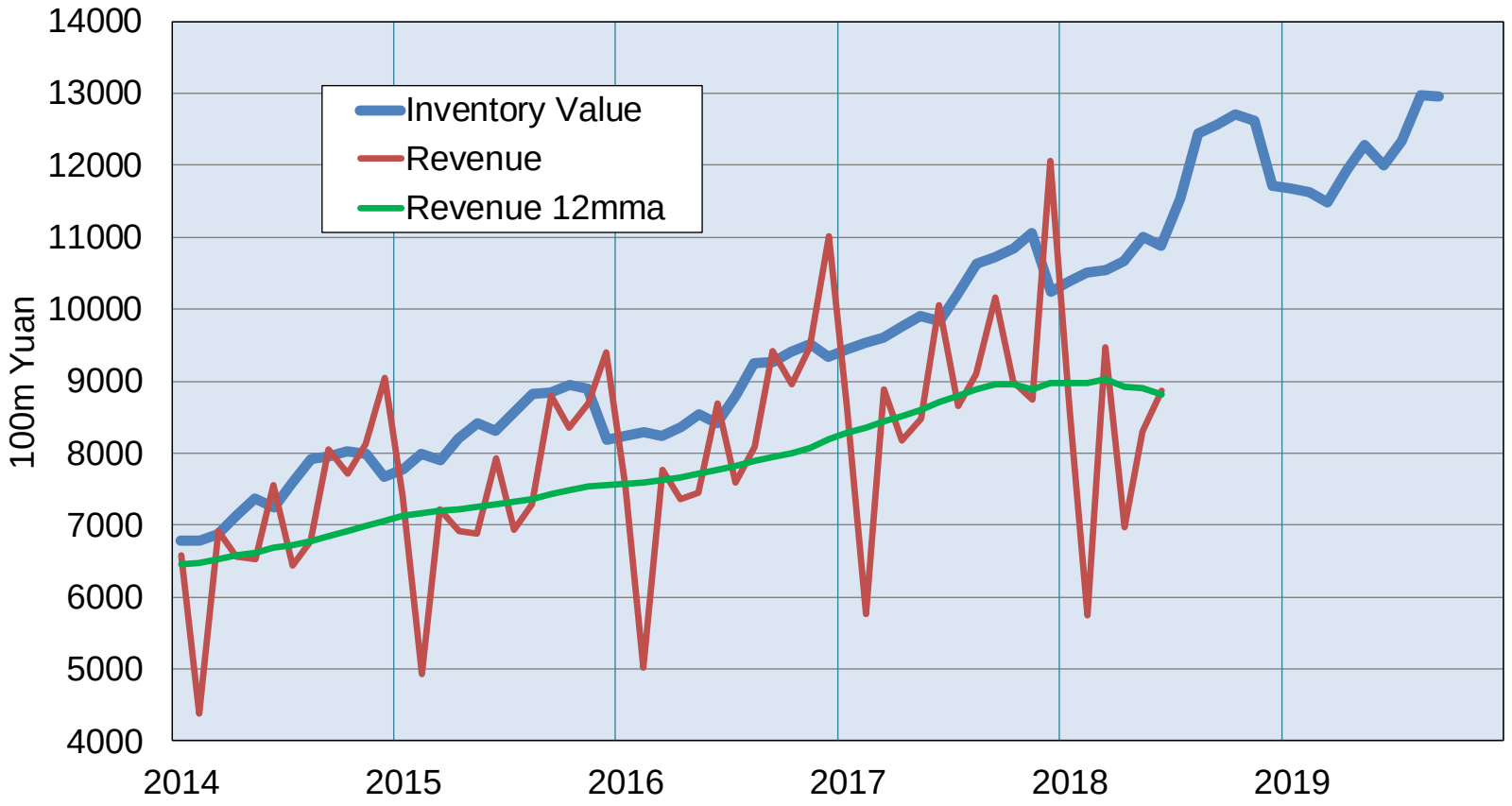
China Electronics Output (6/12 Growth)



Taiwan Electronics Output (6/12 Growth)

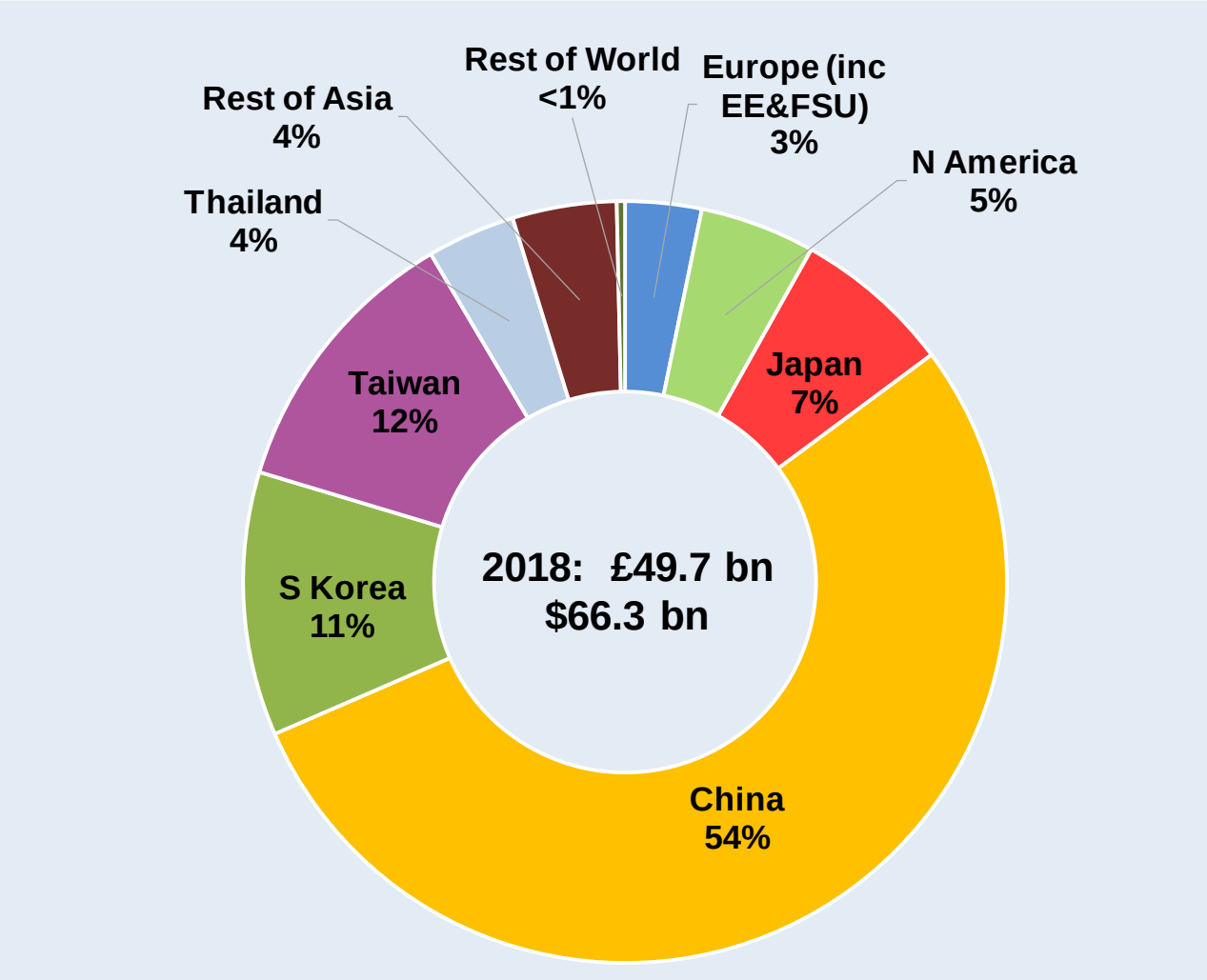


Revenues and Inventory of Major Manufacturers in the Computer and Electronics Sector in China

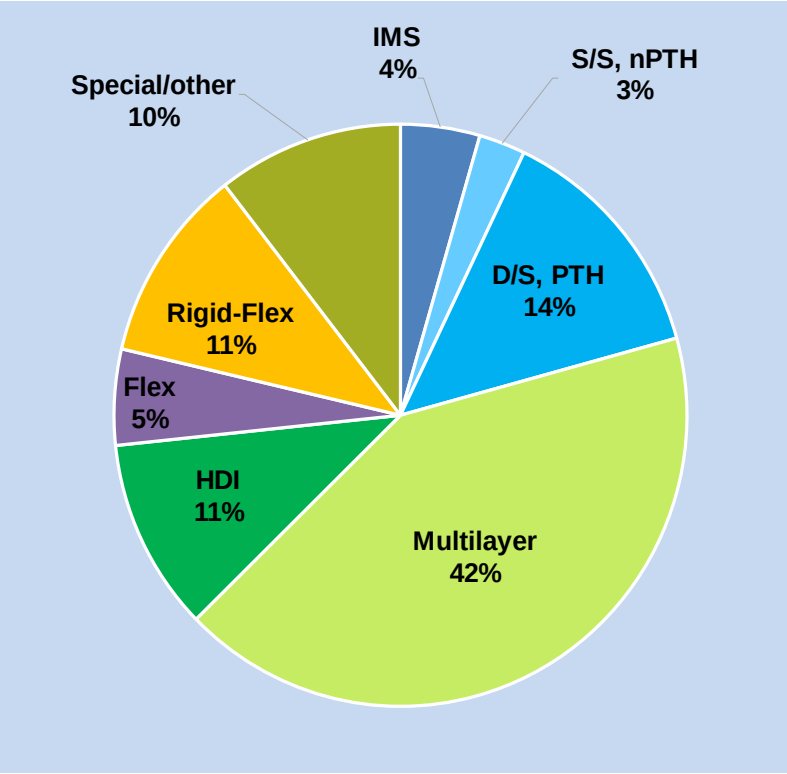


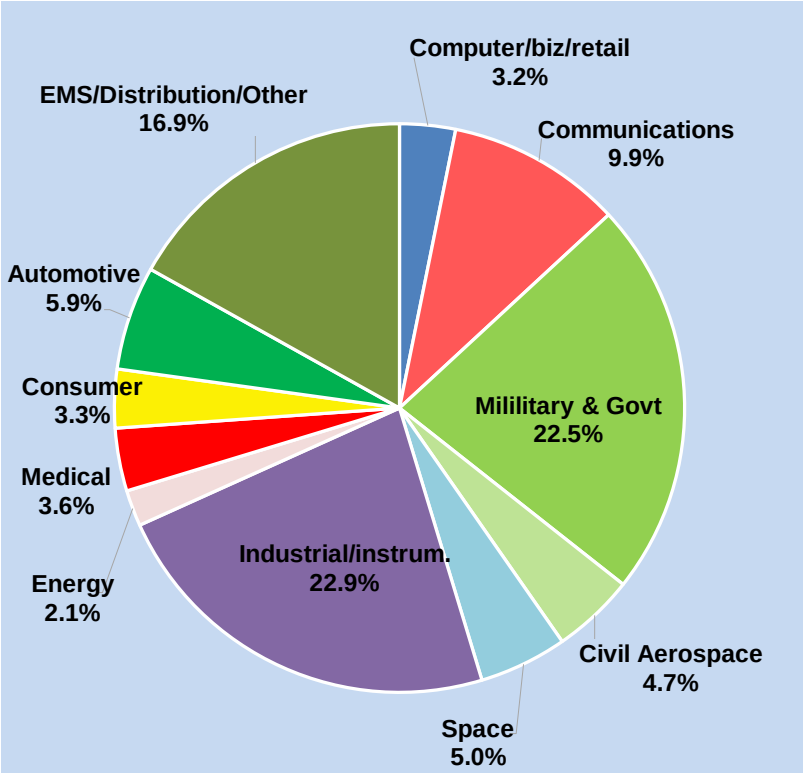
PCB Production Trends

PCB Production



UK PCB Production, £129m in 2018





UK PCB Imports and Exports

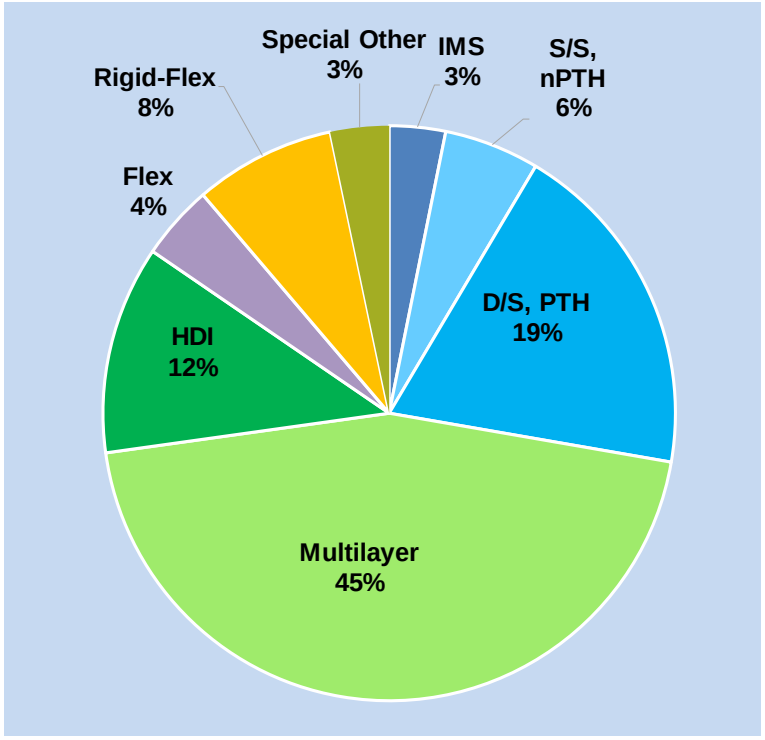
UK PCB IMPORTS AND EXPORTS IN 2018

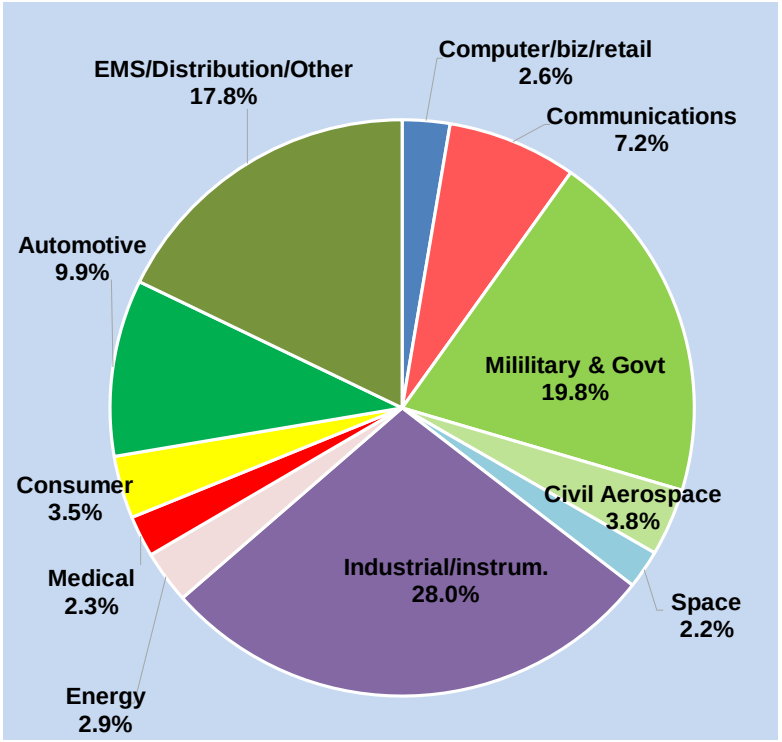
	Import Value £m	Export Value £m	Net Import £m
Single-sided (and other)	67.3	30.2	37.0
Multilayer PCBs (including double/sided)	62.1	67.3	-5.3
Other	204.2	94.8	109.3

	Multilayer			Single Sided			Other			EC	ROW	Total
	EC	ROW	Total	EC	ROW	Total	EC	ROW	Total	Total	Total	ALL
2017												
Imports	94	1210	1304	503	1148	1651	414	4326	4740	1011	6684	7695
Exports	405	73	478	371	122	492	1329	400	1729	2105	595	2700
Net imports	-311	1137	826	132	1026	1158	-915	3927	3011	-1095	6090	4995
2018												
Imports	142	1285	1427	425	985	1409	330	3946	4276	897	6216	7112
Exports	374	46	420	1299	40	1339	1189	198	1387	2862	283	3145
Net imports	-232	1239	1008	-875	945	71	-859	3748	2889	-1965	5933	3968

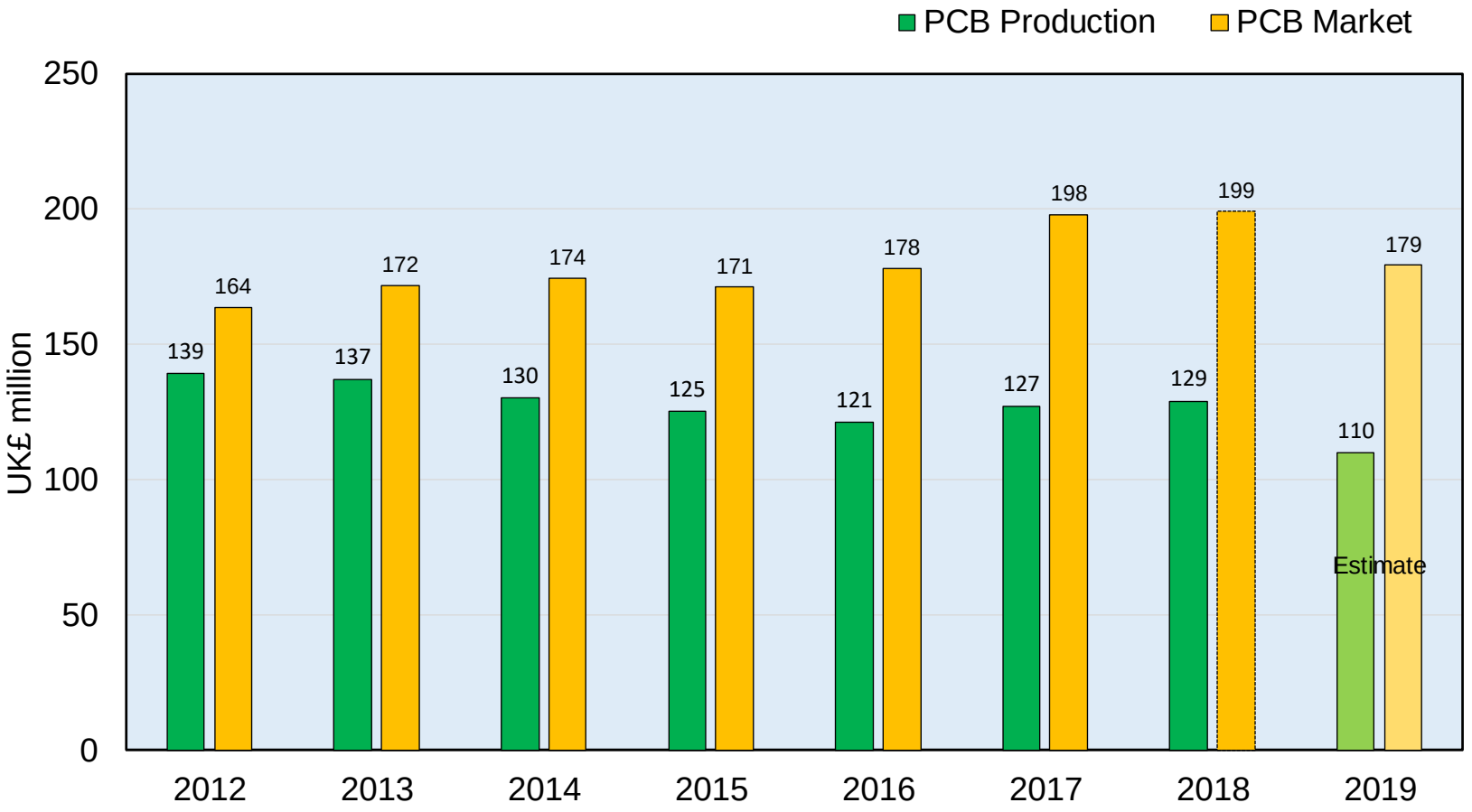
FSC survey results for 2018: net imports £70, (total imports £120m less exports £50m)

UK PCB Market, £199m in 2018

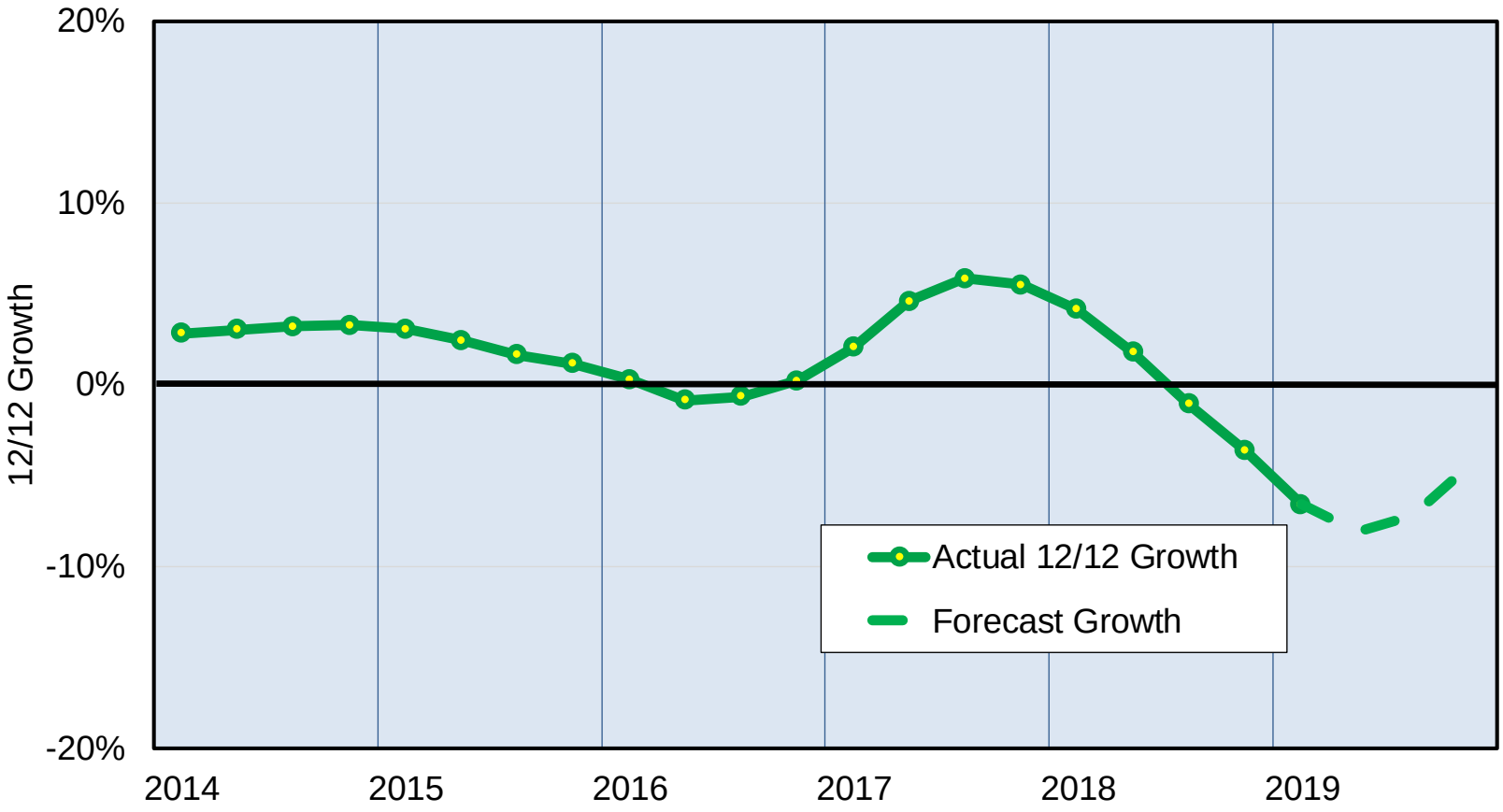




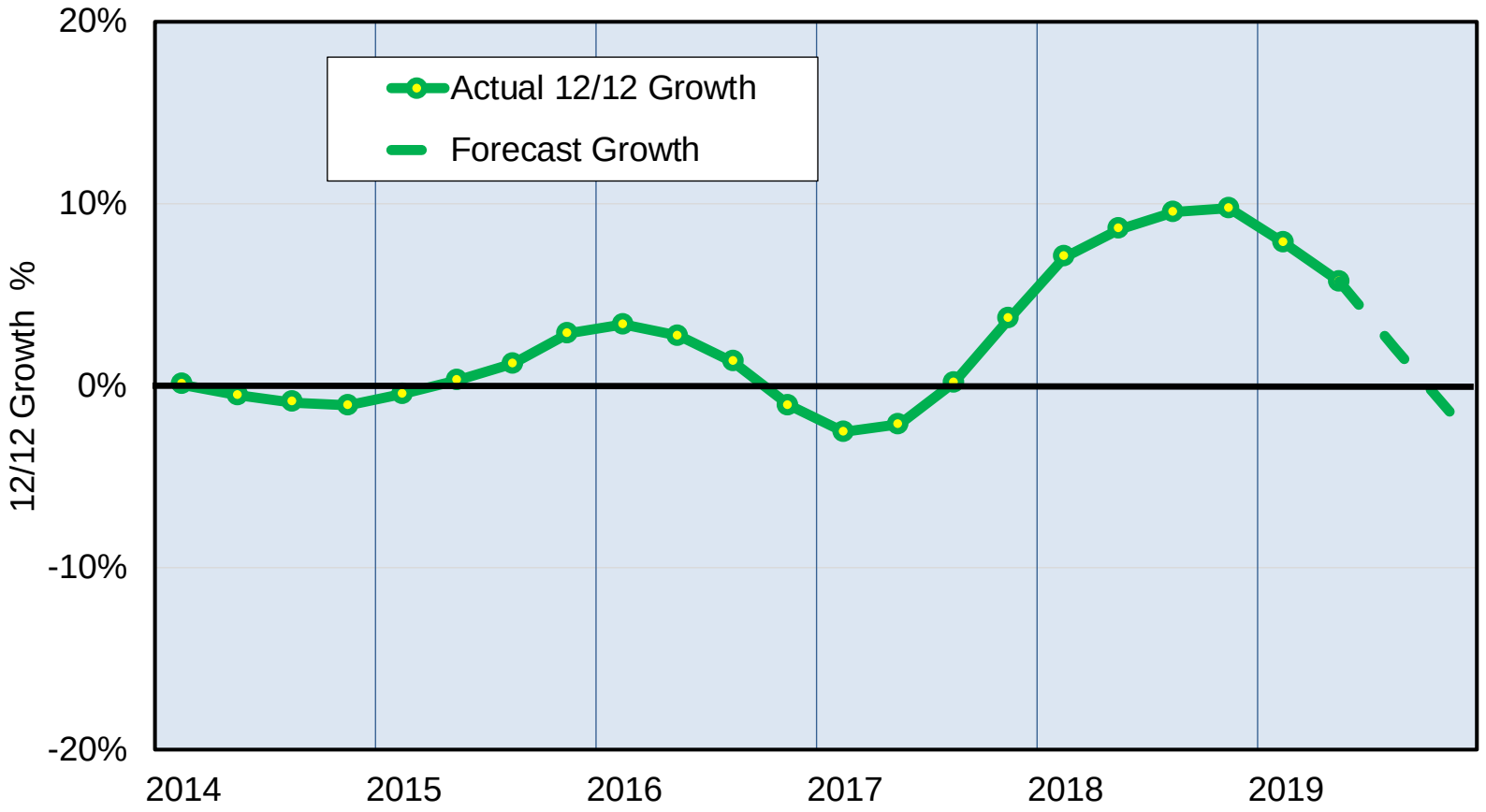
UK PCB Production & Markets



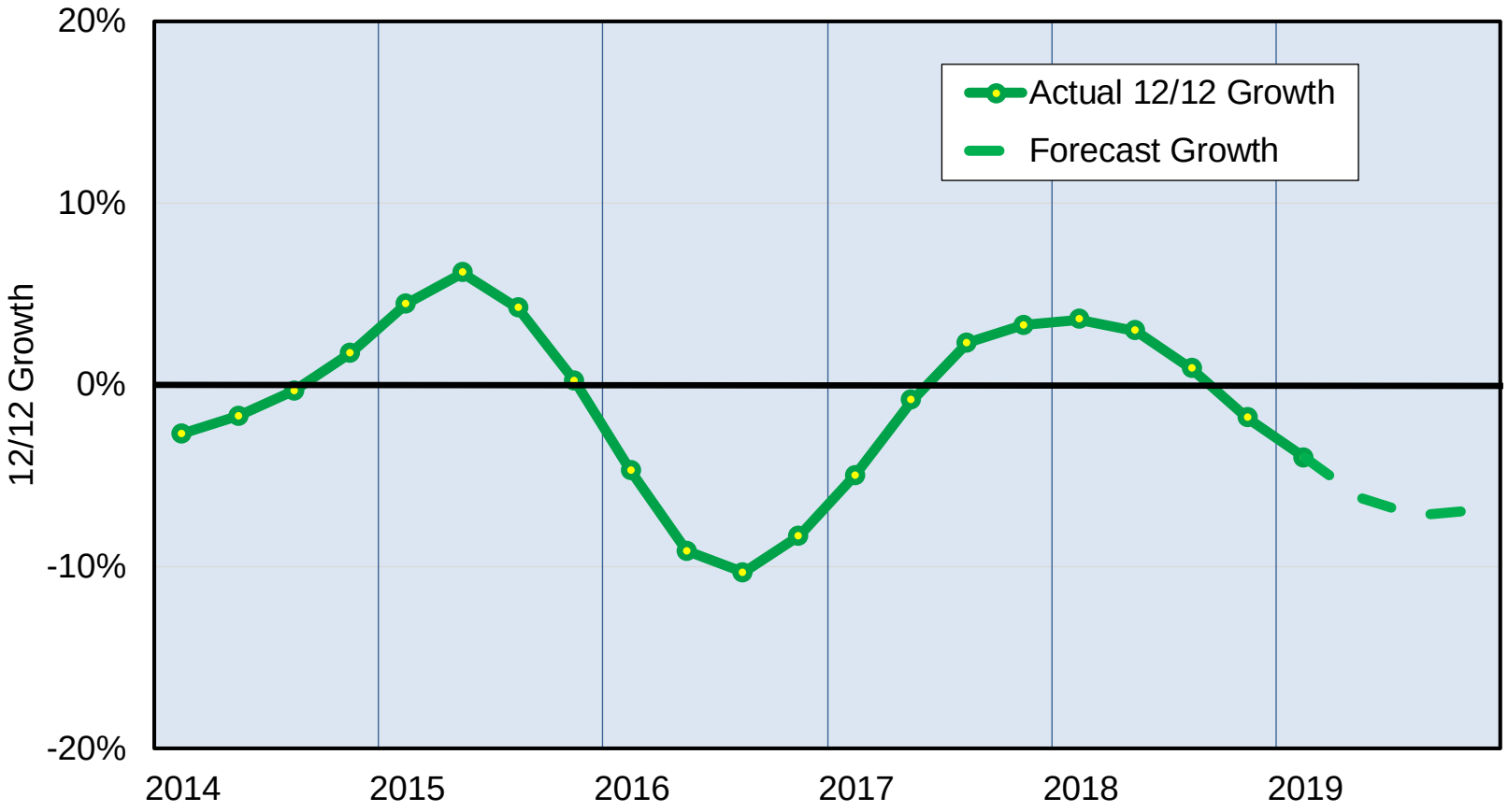
Europe PCB Production



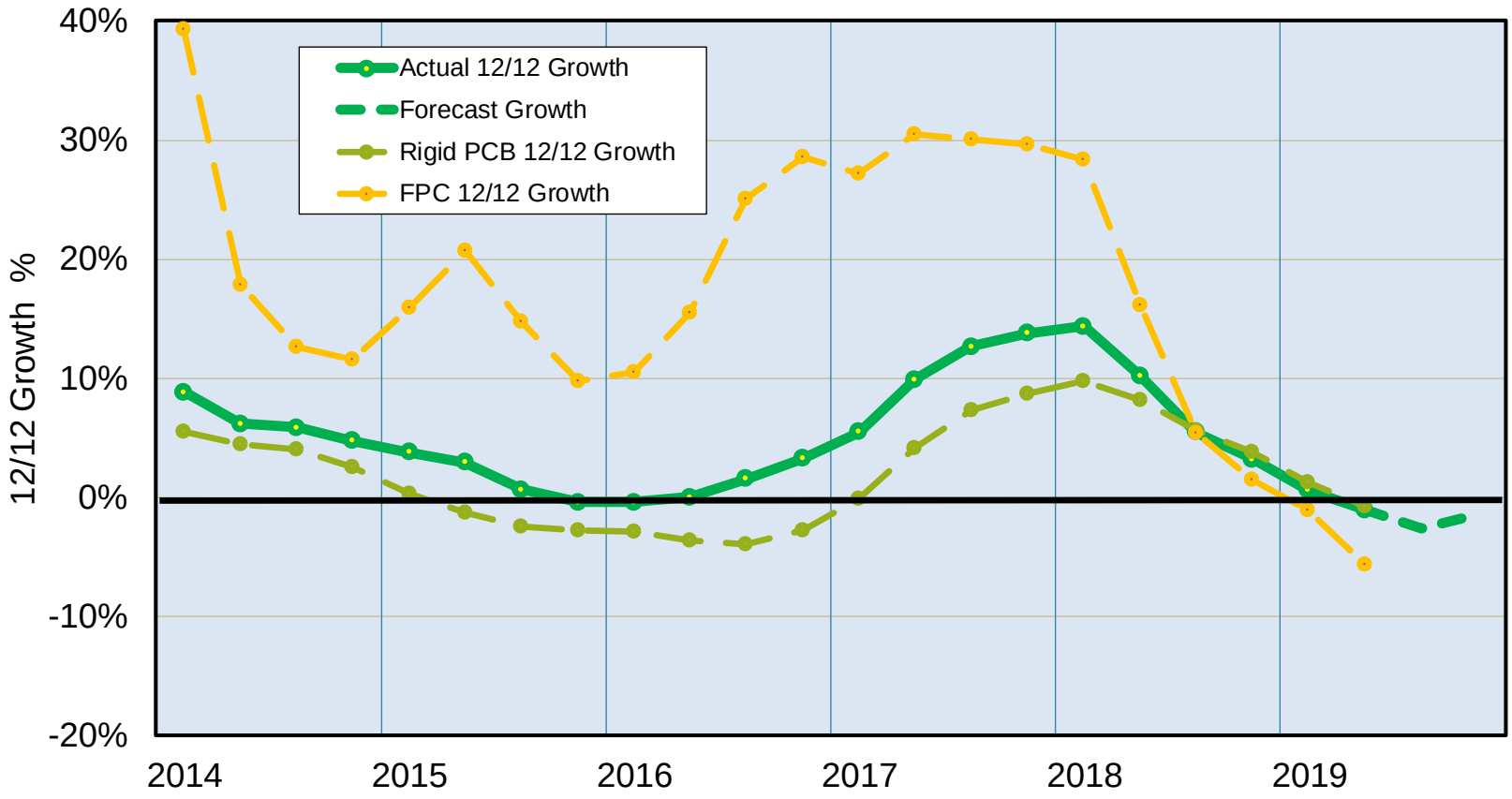
USA PCB Production



Japan PCB Production



China/Taiwan PCB Production



Summary

- Electronics Equipment Production:
  - UK: 14% in 2018 and 2-4% growth in 2019.
  - USA: 6.2% in 2018, 2-3% in 2019
  - China: -2% in 2018, jury out on 2019 (no revenue statistics!)
- PCB production:
  - UK: 1.5% growth in 2018, -9% in 2019
  - Europe: 0.2% in 2018, as much as -10% in 2019
  - USA: 8.5% in 2018, 3-4% (F) in 2019
  - Japan: 3.8% in 2018, -6.6% in 2019
  - Asia (excl Japan): 5% in 2018, expect around 1-2% in 2019

Thank You

Any Questions?