



Global and China Copper Clad Laminate Industry Report, 2014-2018

Sep. 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.

Abstract

Copper clad laminate (CCL), a base material for electronics industry and an important raw material for the manufacturing of printed circuit board (PCB), is widely used in electronic products, including TV, radio, computer, and mobile communications.











In 2014, global CCL output witnessed a year-on-year growth of 7.1% to 760 million square meters, of which 520 million square meters were produced in China, accounting for 68.4% of the global total.

Glass-fabric-base CCL and paper-base CCL are two products that have the largest output in China, separately making up 61.4% and 16.5% of China's total CCL output in 2014.

The Chinese CCL market is highly concentrated, with CR5 in CCL industry standing at 68.0% in 2014. Kingboard Chemical ranked first with a market share of 29.3%, followed by Shengyi Technology (14.8%) and ITEQ Corporation (9.3%).

The CCL industry has entered a new round of growth in recent years, and two regions in Asia- China and Southeast Asia have become the fastest-growing ones. Relevant manufacturers have successively taken measures like capacity expansion and acquisitions to strengthen their CCL business.

CCL Sales and Production Bases of Global Main Manufacturers, 2014

| Manufactures | Production Bases in China | Sales (USD mln) |
|--|-----------------------------|------------------|
|  KB | Guangdong Jiangsu | 1,480 |
|  Nan Ya Plastics | Guangdong Jiangsu | 931 |
|  Shengyi Technology | Shanxi Jiangsu | 875 |
|  Panasonic | Jiangsu | 760 |
|  isola | Guangdong Jiangsu | 515 |
|  ITEQ | Guangdong Jiangsu | 469 |
|  Hitachi Chemical | Guangdong Hong Kong | 380 |
|  GOM | Zhejiang Shanghai Guangdong | 357 |
|  JINBAO | Shandong | 352 |
|  EMC | Jiangsu Guangdong | 329 |

Source: Global and China Copper Clad Laminate Industry Report, 2014-2018; ResearchInChina

Shengyi Technology Co., Ltd.: In Aug 2015, the company announced a capital increase of RMB500 million into its holding subsidiary-Shengyi Technology (Suzhou) Co., Ltd to meet the latter's capital demand for building 11 million m2 CCL and 24 million m2 bonding sheet project.

Guangdong Chaohua Technology Co., Ltd.: In Aug 2015, the company acquired a 51% stake in Zhuhai ATEM Electronic Technology Co., Ltd., which specializes in flexible CCL and is one of few domestic adhesive-free flexible CCL manufacturers.

Goldenmax International Technology Ltd.: Phase I of 10.20 million pcs/a medium and high-grade CCL and 6 million m2 prepreg production line project" was completed and went into production in Oct 2014; Phase II was completed and placed in operation in Apr 2015.

Global and China Copper Clad Laminate Industry Report, 2014-2018 by ResearchInChina focuses on the followings:

- ✘ Supply & demand, structure, competitive landscape of global CCL market;
- ✘ Development environments, market supply & demand, market structure, competitive landscape, and import & export of China's CCL industry
- ✘ Market size, market structure of main upstream and downstream (copper foil, PCB, etc.) of CCL;
- ✘ Operation, development prospects, etc. of 5 global and 17 Chinese CCL manufacturers.

1 Overview of Copper Clad Laminate Industry

- 1.1 Types of Copper Clad Laminate
- 1.2 Industry Characteristics
- 1.3 Industry Chain

2 Status Quo of Global Copper Clad Laminate Industry

- 2.1 Market Size
- 2.2 Market Structure
- 2.3 Competitive Landscape

3 Development Environments for Copper Clad Laminate Industry in China

- 3.1 Industrial Policies
- 3.2 Influencing Factors
 - 3.2.1 Favorable Factors
 - 3.2.2 Negative Factors
- 3.3 Entry Barriers

4 Chinese Copper Clad Laminate Market

- 4.1 Market Size
- 4.2 Market Structure
 - 4.2.1 Rigid Copper Clad Laminate
 - 4.2.2 Flexible Copper Clad Laminate
- 4.3 Competitive Landscape
- 4.4 Market Trend
- 4.5 Import & Export
 - 4.5.1 Import
 - 4.5.2 Export

5 Upstream and Downstream of Chinese

- Copper Clad Laminate Market
 - 5.1 Copper Foil Market

5.2 PCB Market

- 5.2.1 Global
- 5.2.2 China

6 Major Foreign Copper Clad Laminate Manufacturers

- 6.1 Hitachi Chemical
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 R&D
 - 6.1.5 Copper Clad Laminate Business
- 6.2 Rogers
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Revenue Structure
 - 6.2.4 Copper Clad Laminate Business
- 6.3 Other Players
 - 6.3.1 Isola
 - 6.3.2 Arlon
 - 6.3.3 Panasonic Electric Works

7 Major Chinese Copper Clad Laminate Manufacturers

- 7.1 Kingboard Chemical Holdings Ltd.
 - 7.1.1 Profile
 - 7.1.2 Operation
 - 7.1.3 Revenue Structure
 - 7.1.4 Gross Margin
 - 7.1.5 Copper Clad Laminate Business
- 7.2 Shengyi Technology Co., Ltd.
 - 7.2.1 Profile
 - 7.2.2 Operation
 - 7.2.3 Revenue Structure

7.2.4 Gross Margin

- 7.2.5 Copper Clad Laminate Business
- 7.2.6 Key Projects

- 7.3 Goldenmax International Technology Ltd.
- 7.4 Guangdong ChaoHua Technology Co., Ltd.
- 7.5 ITEQ Corporation
- 7.6 Guangdong Goworld Co., Ltd.
- 7.7 Zhejiang Huazheng New Material Co., Ltd.
- 7.8 Shanghai Nanya Copper Clad Laminate Co., Ltd.
- 7.9 Elite Material Co. Ltd.
- 7.10 Changzhou Zhongying Science & Technology Co., Ltd.
 - 7.10.1 Profile
 - 7.10.2 Copper Clad Laminate Business
- 7.11 Others
 - 7.11.1 Nan Ya Plastics Corporation
 - 7.11.2 Formosa Laboratories, Inc.
 - 7.11.3 Grace Electron Corp. (Guangzhou)
 - 7.11.4 Shandong Jinbao Electronics Co., Ltd.
 - 7.11.5 VENTEC Electronics (Suzhou) Co., Ltd.
 - 7.11.6 Shandong Laiwu Jinding Electronic Materials Co., Ltd.
 - 7.11.7 ChangChun Group

8 Summary and Forecast

- 8.1 Market
- 8.2 Enterprise


- Structure and Materials of Main Copper Clad Laminates
- Classification of Copper Clad Laminate
- Copper Clad Laminate Industry Chain
- Sales and Growth Rate of Global Copper Clad Laminate Industry, 2008-2018E
- Global Copper Clad Laminate Output, 2007-2018E
- Output Value Structure of Global Copper Clad Laminate (by Product), 2009-2014
- Output Structure of Global Copper Clad Laminate (by Region), 2011-2014
- Competition in Global Copper Clad Laminate Market, 2014
- China's Policies on Copper Clad Laminate Industry, 2008-2015
- Copper Clad Laminate Output and Sales Volume in China, 2011-2018E
- Revenue and Growth Rate of Copper Clad Laminate Industry in China, 2009-2018E
- Regional Distribution of Copper Clad Laminate Manufacturers in China, 2014
- Structure of Copper Clad Laminate Output in China (by Product), 2014
- Structure of Rigid Copper Clad Laminate Output in China (by Product), 2011-2014
- Flexible Copper Clad Laminate Output and Growth Rate in China, 2008-2014
- Distribution of Flexible Copper Clad Laminate Capacity in China, 2014
- Major Flexible Copper Clad Laminate Manufacturers in China
- Competition in Chinese Copper Clad Laminate Market, 2013-2014
- Import and Export of Copper Clad Laminate in China (Mainland), 2011-2015
- Import Volume Structure of Copper Clad Laminate in China (Mainland) (by Country/Region), 2013-2014
- Import Value Structure of Copper Clad Laminate in China (Mainland) (by Country/Region), 2013-2014
- Export Volume Structure of Copper Clad Laminate in China (Mainland) (by Country/Region), 2013-2014
- Export Value Structure of Copper Clad Laminate in China (Mainland) (by Country/Region), 2013-2014
- Major Copper Foil Manufacturers in China
- Key Copper Foil Capacity Expansion Projects in China, 2014-2015

- Copper Foil Output in China, 2009-2018E
- Copper Foil Sales Structure in China (by Product), 2012-2014
- Output Value and Growth Rate of Global PCB Industry, 2009-2018E
- Output Value Structure of Global PCB Industry (by Region), 2006/2014/2018
- Output Value Structure of Global PCB Industry (by Product), 2012-2014
- World's Renown PCB Manufacturers
- Output Value of PCB Industry in China, 2010-2018E
- Distribution of PCB Industry in China, 2014
- Capacity and Revenue of Major PCB Manufacturers in China, 2014
- Global Marketing Network of Hitachi Chemical
- Net Sales and Net Income of Hitachi Chemical, FY2009-FY2014
- Global Subsidiaries of Hitachi Chemical, FY2014
- Revenue Structure of Hitachi Chemical (by Product), FY2013-FY2014
- Revenue Breakdown of Hitachi Chemical (by Region), FY2008-FY2014
- Main R&D Centers of Hitachi Chemical, 2015
- R&D Spending Structure of Hitachi Chemical (by Product), FY2012-FY2014
- Hitachi Chemical's Revenue from Copper Clad Laminate Business, 2011-2015
- Hitachi Chemical's Global Marketing Network for Copper Clad Laminates, 2014
- Hitachi Chemical's Marketing Network in China
- Hitachi Chemical's Copper Clad Laminate Subsidiaries in China
- Revenue and Net Income of Rogers, 2009-2015
- Revenue Structure of Rogers (by Product), 2012-2015
- Revenue Structure of Rogers (by Region), 2013-2014
- Rogers' Revenue from Copper Clad Laminate Business, 2011-2015
- Isola's Revenue from Copper Clad Laminate Business, 2011-2015

- Global Marketing Network of Isola
- Panasonic Electric Works' Revenue from Copper Clad Laminate Business, 2011-2015
- Copper Clad Laminate Revenue and Growth Rate of Panasonic Electric Works Electronic Materials (Suzhou), 2011-2014
- Revenue and Net Income of Kingboard Chemical, 2007-2015
- Revenue Structure of Kingboard Chemical (by Product), 2012-2014
- Revenue Structure of Kingboard Chemical (by Region), 2012-2014
- Gross Profit and Gross Margin of Kingboard Chemical, 2008-2014
- Main Categories of Copper Clad Laminates of Kingboard Chemical
- Copper Clad Laminate Sales Volume of Kingboard Chemical, 2010-2014
- Kingboard Chemical's Revenue from Copper Clad Laminate Business and Growth Rate, 2008-2014
- Copper Clad Laminate Revenue Structure of Kingboard Chemical, 2012-2014
- Main Copper Clad Laminate Factories/Companies of Kingboard Chemical
- Equity Structure of Shengyi Technology, 2015
- Revenue and Net Income of Shengyi Technology, 2009-2015
- Revenue Structure of Shengyi Technology (by Product), 2012-2014
- Revenue Structure of Shengyi Technology (by Region), 2012-2014
- Gross Margin of Shengyi Technology (by Product), 2010-2014
- Main Categories of Copper Clad Laminates of Shengyi Technology
- Copper Clad Laminate Output and Sales Volume of Shengyi Technology, 2009-2014
- Shengyi Technology's Revenue from Copper Clad Laminate Business and Growth Rate, 2009-2014
- Copper Clad Laminate Revenue Structure of Shengyi Technology, 2014
- Main Copper Clad Laminate Production Bases of Shengyi Technology
- Equity Structure of Goldenmax International Technology, 2015
- Revenue and Net Income of Goldenmax International Technology, 2009-2015
- Revenue Structure of Goldenmax International Technology (by Product), 2012-2014

- Revenue Structure of Goldenmax International Technology (by Region), 2012-2014
- Gross Margin of Goldenmax International Technology (by Product), 2010-2014
- Copper Clad Laminate Output and Sales Volume of Goldenmax International Technology, 2010-2014
- Goldenmax International Technology's Revenue from Copper Clad Laminate Business and Growth Rate, 2010-2014
- Main Copper Clad Laminate Production Bases of Goldenmax International Technology, 2014
- Equity Structure of Guangdong ChaoHua Technology, 2015
- Revenue and Net Income of Guangdong ChaoHua Technology, 2008-2015
- Revenue Structure of Guangdong ChaoHua Technology (by Product), 2012-2015
- Revenue Structure of Guangdong ChaoHua Technology (by Region), 2013-2015
- Gross Margin of Guangdong ChaoHua Technology (by Product), 2010-2015
- Copper Clad Laminate Output and Sales Volume of Guangdong ChaoHua Technology, 2011-2014
- Guangdong ChaoHua Technology's Revenue from Copper Clad Laminate Business and Growth Rate, 2008-2015
- Global Marketing Network of ITEQ
- Revenue and Net Income of ITEQ, 2010-2015
- Revenue Structure of ITEQ (by Product), 2012-2015
- Revenue Structure of ITEQ (by Region), 2012-2014
- ITEQ's Revenue from Copper Clad Laminate Business and Growth Rate, 2011-2015
- Copper Clad Laminate Output Structure of ITEQ, 2014
- Equity Structure of Goworld, 2015
- Revenue and Net Income of Goworld, 2009-2015
- Revenue Structure of Goworld (by Product), 2012-2014
- Revenue Structure of Goworld (by Region), 2012-2014
- Gross Margin of Goworld (by Product), 2011-2014
- Copper Clad Laminate Output and Sales Volume of Goworld, 2011-2014
- Goworld's Revenue from Copper Clad Laminate Business and Growth Rate, 2011-2014

- Equity Structure of Zhejiang Huazheng New Material, 2015
- Revenue and Net Income of Zhejiang Huazheng New Material, 2011-2014
- Major Customers of Zhejiang Huazheng New Material
- Major Suppliers of Zhejiang Huazheng New Material
- Copper Clad Laminate Subsidiaries of Zhejiang Huazheng New Material
- Copper Clad Laminate Output and Sales Volume of Zhejiang Huazheng New Material, 2011-2014
- Zhejiang Huazheng New Material's Revenue from Copper Clad Laminate Business, 2011-2014
- Revenue and Growth Rate of Shanghai Nanya Copper Clad Laminate, 2003-2014
- Shanghai Nanya Copper Clad Laminate's Revenue from Copper Clad Laminate Business, 2011-2014
- Global Marketing Network of Elite Material
- Revenue and Net Income of Elite Material, 2010-2015
- Revenue Structure of Elite Material (by Product), 2012-2014
- Elite Material of Elite Material (by Region), 2013-2015
- Consolidated Gross Margin of Elite Material, 2010-2015
- Distribution of Copper Clad Laminate Production Bases and Capacity of Elite Material
- Elite Material's Revenue from Copper Clad Laminate Business, 2010-2014
- Capacity of Main Products of Changzhou Zhongying Science & Technology
- Copper Clad Laminate Revenue of Nan Ya Plastics, 2011-2015
- Copper Clad Laminate Output and Sales Volume of Nan Ya Plastics, 2013-2014
- Main Copper Clad Laminate Production Bases of Nan Ya Plastics
- Global Marketing Network of Taiwan Union Technology
- Copper Clad Laminate Production Bases of Taiwan Union Technology
- Copper Clad Laminate Revenue and Growth Rate of Grace Electron Corp. (Guangzhou), 2011-2014
- Copper Clad Laminate Revenue and Growth Rate of Shandong Jinbao Electronics, 2011-2014
- Copper Clad Laminate Revenue and Growth Rate of VENTEC Electronics, 2011-2014

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- Copper Clad Laminate Capacity of ChangChun Group
 - Growth in Sales of Global and China Copper Clad Laminate Industry, 2009-2018E
 - Growth in Import and Export of Copper Clad Laminate in China, 2011-2014
 - Revenue Growth Rate of Major Global Copper Clad Laminate Manufacturers, 2009-2015
 - Competition among Major Global and Chinese Copper Clad Laminate Manufacturers, 2014

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