

Association Connecting Electronics Industries



Results of IPC Survey of OEMs on the Demand for High-Density Interconnect PCBs

November 2008

Produced by IPC Market Research

TABLE OF CONTENTS

Introduction	1
Trends in Demand for HDI Boards.....	2
Supply of HDI Boards Versus Demand.....	3
Markets for HDI Boards.....	4

This report is available electronically from:

IPC – Association Connecting Electronics Industries®
3000 Lakeside Drive, Suite 309 S
Bannockburn, IL 60015, USA
Tel: +1 847-615-7100
www.ipc.org

INTRODUCTION

About the Survey

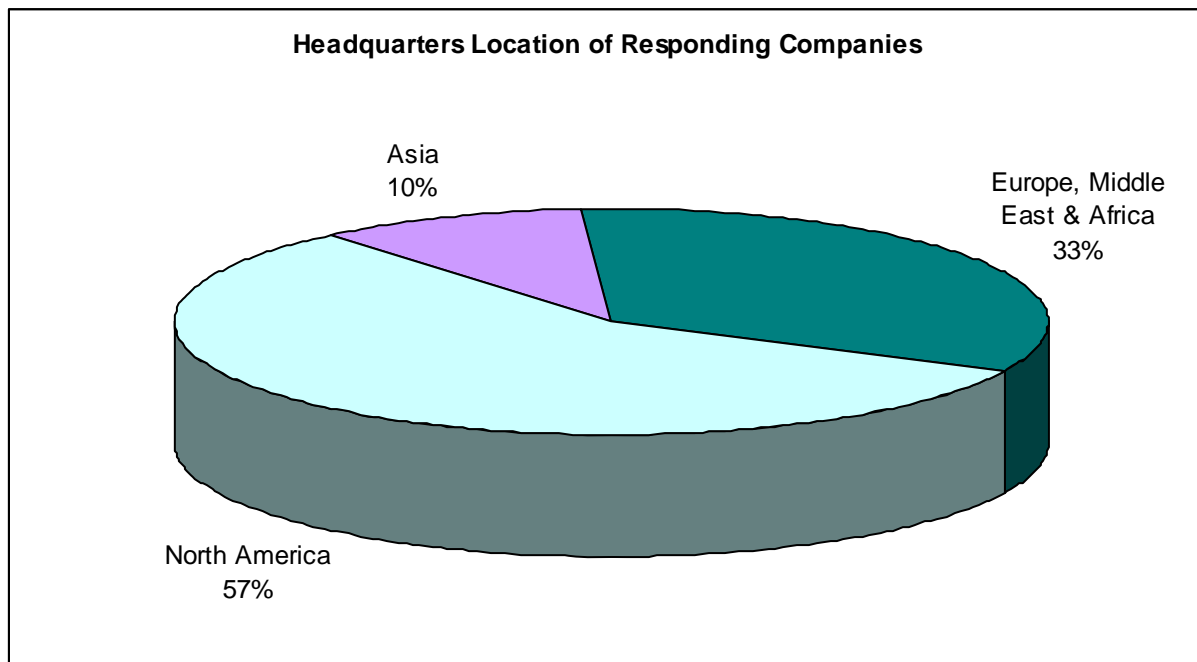
From August 14 through September 5, 2008, IPC surveyed design engineers, printed circuit board (PCB) buyers and other key personnel at original equipment manufacturers (OEMs) in North America and Europe. Thirty OEMs responded, which produced an adequate and representative survey sample. The intent was not to produce statistically significant data, but simply to identify trends and issues in the topic.

The goal of the survey was to determine whether the demand for high-density interconnect (HDI) PCBs is growing and whether the current is meeting the demand. HDI technology has been growing in popularity for many years in Asia. There has been speculation that a substantial demand exists in other regions where HDI board production is still very limited.

This was a "Fast Facts" survey, conducted on a one-time basis by IPC in response to member inquiries to take the pulse of the marketplace on current trends and market conditions.

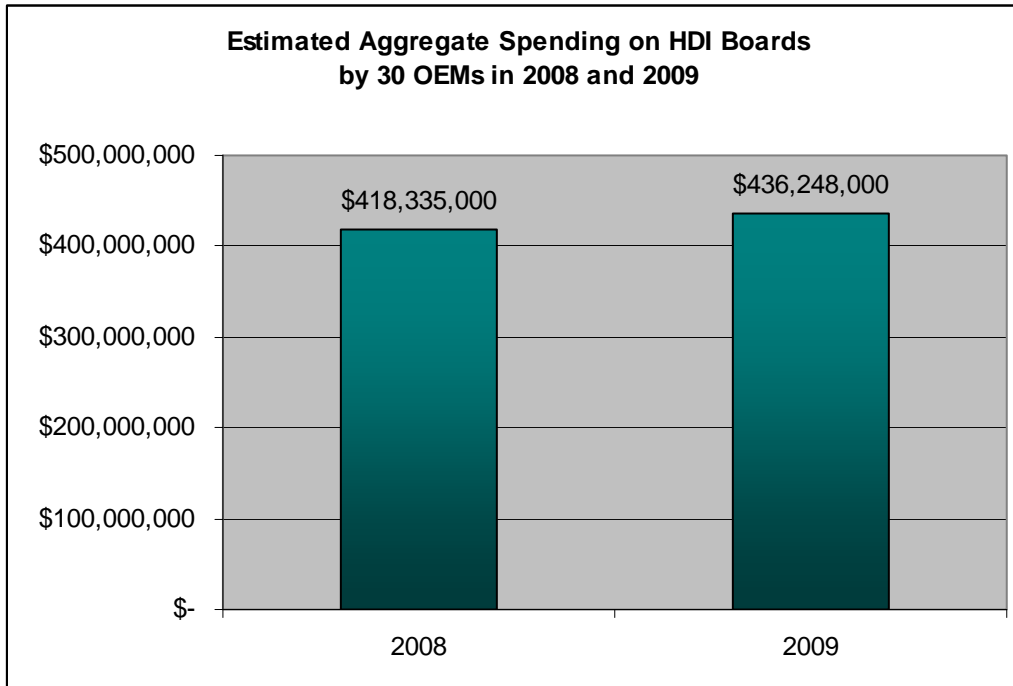
Demographics

The majority of responding companies are headquartered in North America, but most of them have worldwide manufacturing operations.

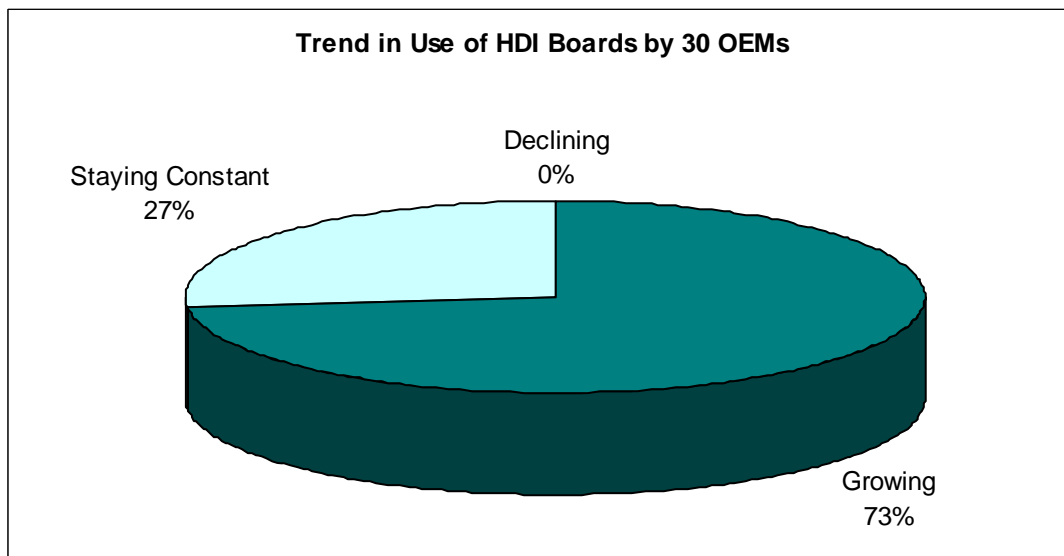


TRENDS IN DEMAND FOR HDI BOARDS

The OEMs participating in the IPC survey expect to spend, on average, 4.3 percent more on HDI boards in 2009 than in 2008. Average spending on HDI boards by these 32 companies in 2008 was US\$13,944,500.

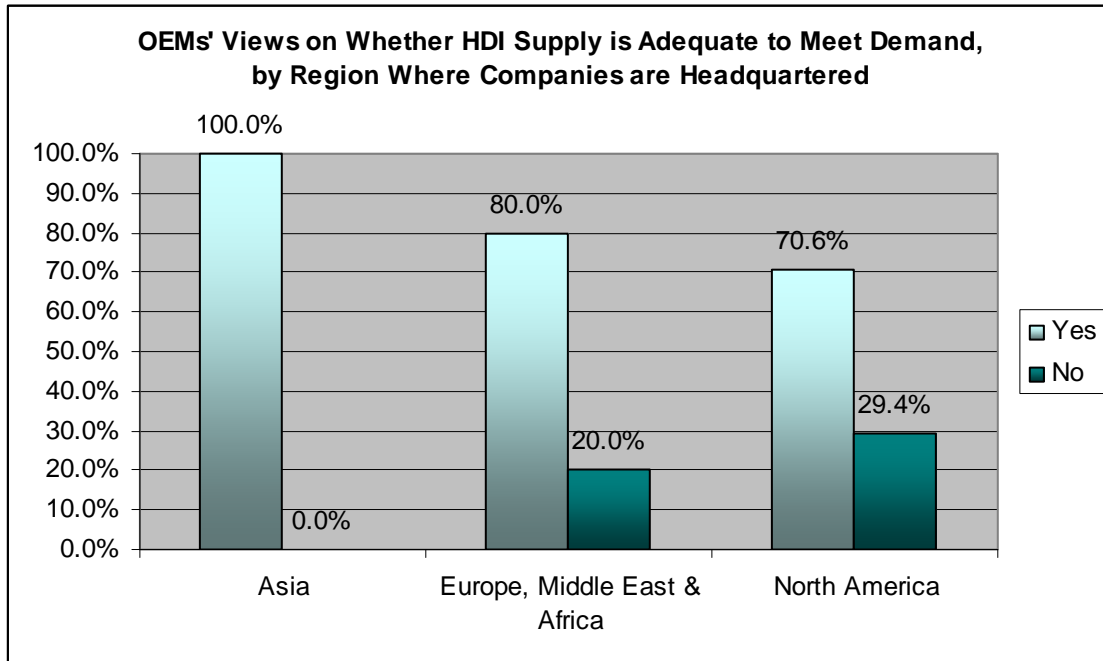


Seventy-three percent of the OEMs surveyed believe their use of HDI boards is growing. None of those surveyed saw it declining.

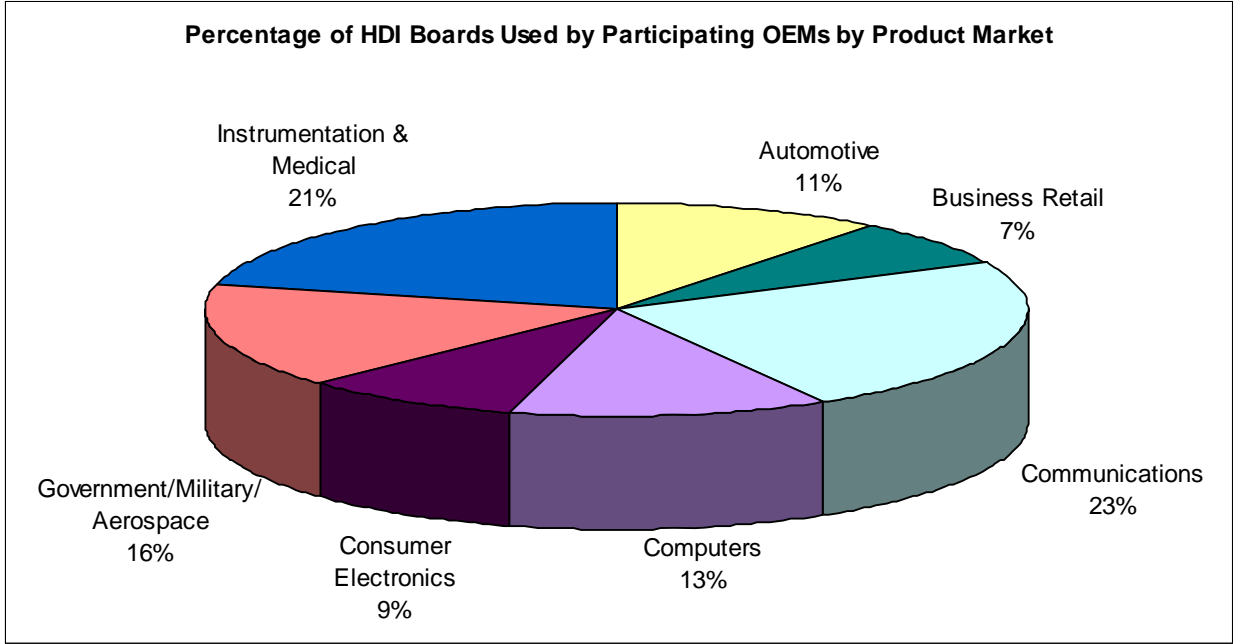


SUPPLY OF HDI BOARDS VERSUS DEMAND

Based on the survey sample, almost 30 percent of the OEMs headquartered in North America believe the supply of HDI boards is not adequate to meet regional demand. Twenty percent of the companies headquartered in Europe, the Middle East and Africa cited a deficit of supply.



MARKETS FOR HDI BOARDS



Association Connecting Electronics Industries



3000 Lakeside Drive, Suite 309 S
Bannockburn, IL 60015