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## FOREWORD

The electronic interconnection industry includes manufacturers of electronic products and the printed circuit boards (PCBs) that are their foundation, electronics manufacturing services (EMS) companies, and suppliers of materials and equipment to those manufacturers. The mission of IPC-Association Connecting Electronics Industries is to support participants in this industry worldwide through programs to enhance competitive excellence and financial success.

IPC's services to members include an extensive program of market research and statistics. All data included in this report comes from IPC's annual survey of the North American flexible circuit industry, unless otherwise noted. The 2008-2009 survey was conducted from April through June 2009.

The information in this report is based on data provided by nine producers of flexible circuits in the USA and Canada with total sales of \$857 million, including some overseas sales. These companies represent roughly seventy percent of the North American flexible circuit market.

IPC and its members owe their thanks to the flexible circuit manufacturers who expended their time and effort to provide the extensive data for this report.

This report is available to IPC members for \$475 and to non-members for \$950. Companies that participated in the survey are entitled to receive the report for free. For more information about the report, please contact Ms. Sree Bhagwat, IPC's market research manager, at 1-330-677-5563 or [sreebhagwat@ipc.org](mailto:sreebhagwat@ipc.org). For information about IPC market research programs and services, please contact Ms. Sharon Starr, IPC's director of market research, at 1-847-597-2817 or [sharonstarr@ipc.org](mailto:sharonstarr@ipc.org), or visit IPC's website at [www.ipc.org/industrydata](http://www.ipc.org/industrydata).