

SGO Leiterplattentagung 2023

Marktanalyse Europa

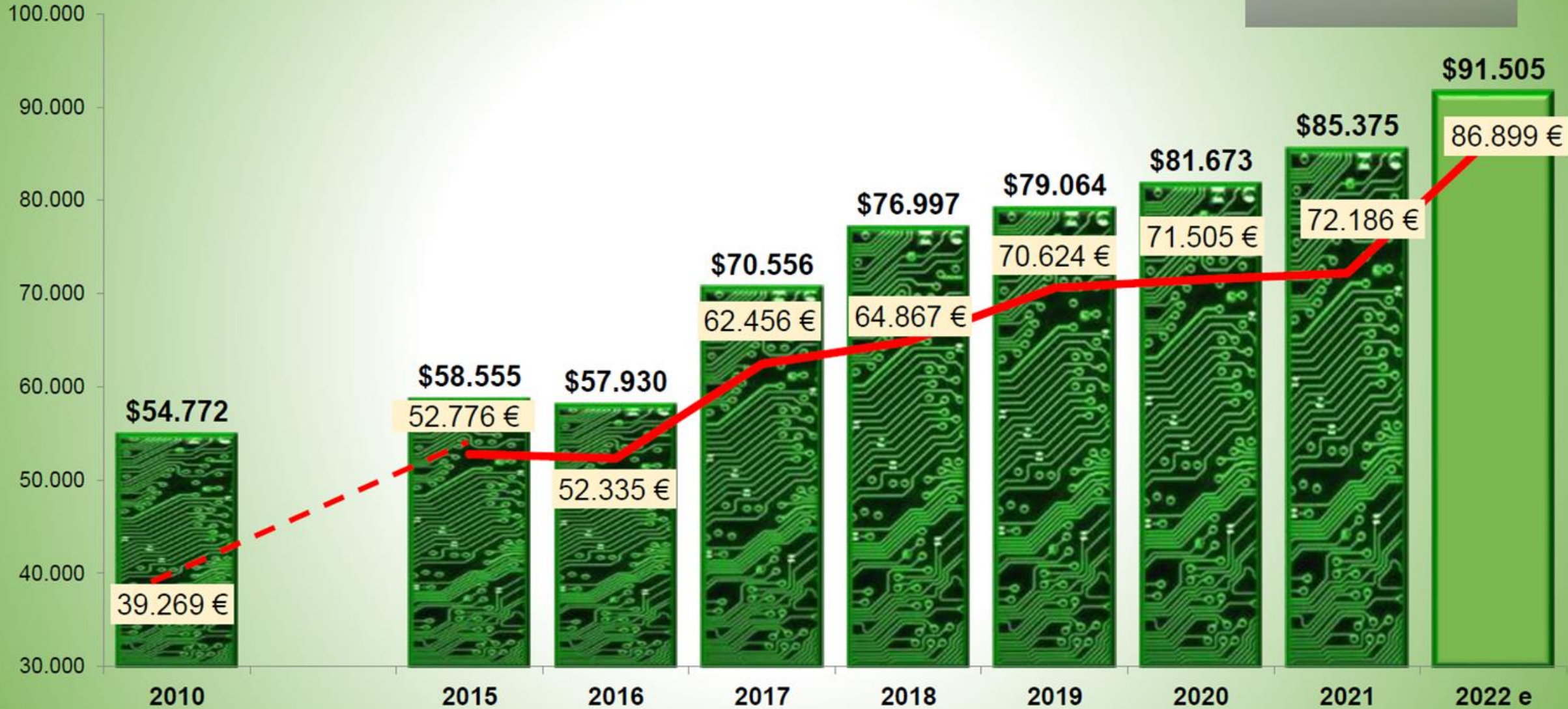
European PCB-production

Data4PCB

summary	2015	>>	2019	2020	2021	2022
revenues (million €)	1.815		1.764	1.513	1.648	1.758
staff	16.491		15.783	14.989	15.361	14.958
number of manufacturers per company size						
< 2 million €	109		43	56	57	55
2 – 10 million €	98		101	80	77	74
10 – 50 million €	34		37	31	32	38
> 50 million €	6		6	5	5	5
Total	247		187	172	172	172

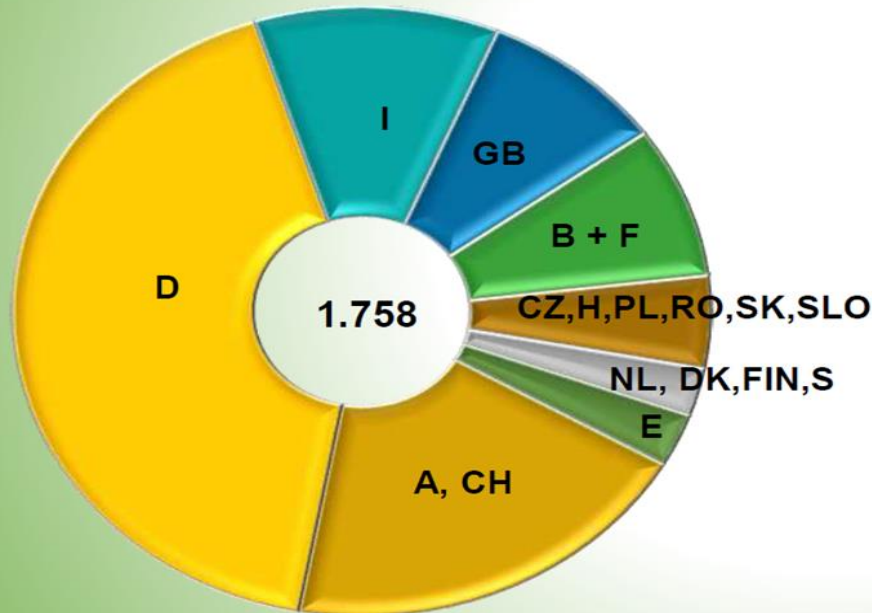
Global PCB production in USD and EUR

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European PCB-production 2022

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	production (M EUR)	% of Europe
Germany	740,97	42,1
Austria + Switzerland	344,06	19,6
Italy	199,16	11,3
Great Britain	152,40	8,7
Belgium + France	141,51	8,0
Central Europe	86,20	4,9
Spain	49,39	2,8
Rest of Europe	44,47	2,5

Produktion 2021 →

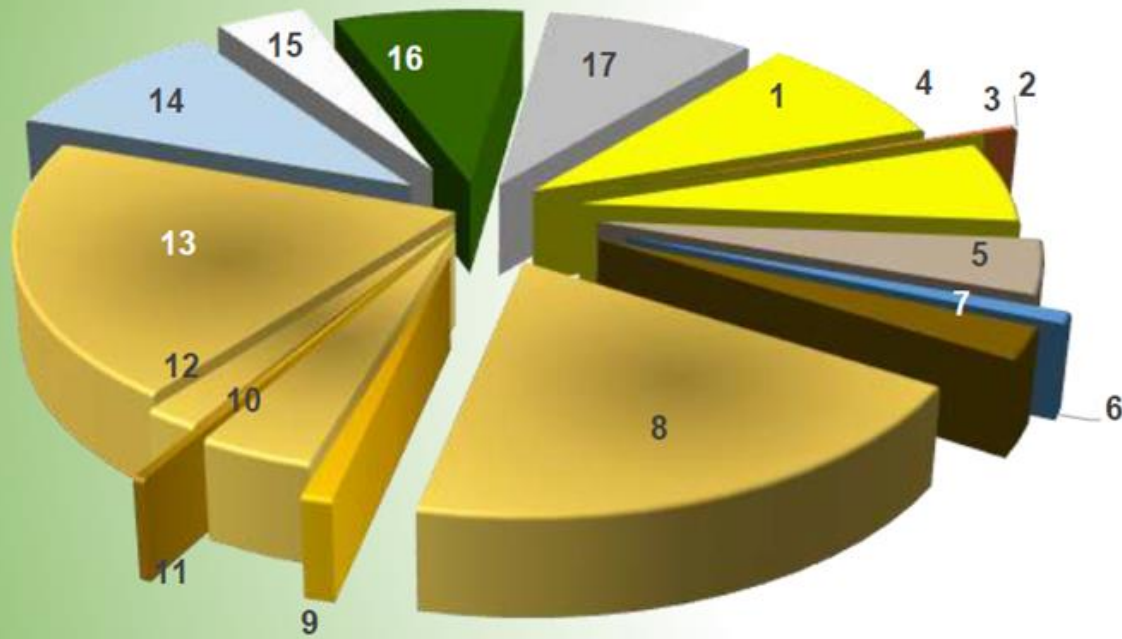
	production value	share of Europe
Germany	709,0 m €	= 43,0%
Austria + Switzerland	322,9 m €	= 19,6%
Italy	193,7m €	= 11,7%
UK	139,6 m €	= 8,5%
Belgium + France	123,3 m €	= 7,5%
Central Europe	83,2 m €	= 5,0%
Spain	40,1 m €	= 2,4%
Netherlands + Scandinavia	36,5 m €	= 2,2%

Europe 2022: detailed industrial segmentation



legend:

1 automotive	9,2%	
2 rail cars	0,4%	
3 e-bikes, e-scooters, heavy equipment	0,1%	
4 mobility not specified	4,8%	
mobility		14,5%
5 communication		4,2%
6 computer		0,9%
7 consumer		2,5%
8 industrial electronics	20,4%	
9 building technology	0,8%	
10 measurement & control	3,7%	
11 smart home	0,3%	
12 power generation	1,1%	
13 industry not specified	17,9%	
industry		44,1%
14 medical		10,5%
15 aeronautics & space		4,8%
16 defence		8,1%
17 special types		10,4%



Europe 2022 : top 30 companies *)
 > 10 million annual sales

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1	KSG-Group / D	11	Somacis / I	21	Graphic / GB
2	AT&S / A	12	ACB Group / B + F	22	Cicor Group / CH
3	Würth-Gruppe / D	13	Cistelaier-Group I + F + D	23	Cimulec Group / F
4	Schweizer Electronic / D	14	Aspocomp / FIN	24	Schaltungsdruck Storz / D
5	Elvia-Group / F	15	Varioprint / CH	25	Ilfa / D
6	Unimicron / D	16	Invotec / GB	26	Lüberg / D
7	GS Swiss PCB / CH	17	Eurocircuits Group / H + D	27	tw-elektric / D
8	Mektec Europe / D	18	Optiprint / CH	28	LAB / E
9	Dyconex / CH	19	Polytron / D	29	Precoplat / D
10	hmp Heidenhain / D	20	Rohde & Schwarz / D	30	Elekonta Marek / D

*) European production 2022 only, no trade

Deutschland

summary	2015	>>	2019	2020	2021	2022
revenues (million €)	796,0		752,1	650,3	708,96	740,97
= % of Europe	43,8 %		42,6%	43,0%	43,0%	42,1%

Schweiz / Österreich

summary	2015		2019	2020	2021	2022
revenues (million €)	315,5		301,6	278,4	322,9	344,1
= % of Europe	17,3 %		17,1%	18,4%	19,6%	19,6%

Frankreich/Belgien(neu)

summary	2015	>>>	2019	2020	2021	2022
revenues (million €)	179,7		170,8	126,5	123,3	141,5
= % of Europe	9,9%		9,7%	8,4%	7,5%	7,5%

Grossbritannien

summary	2015	>>>	2019	2020	2021	2022
revenues (million €)	157,4		152,4	130,4	139,4	152,4
= % of Europe	8,7%		8,6%	8,6%	8,5%	8,7%

Italien

summary	2015	>>>	2019	2020	2021	2022
revenues (million €)	180,9		207,3	176,2	193,7	199,2
= % of Europe	10,0%		11,7%	11,6%	11,7%	11,3%

Spanien

summary	2015	>>>	2019	2020	2021	2022
revenues (million €)	48,6		43,2	34,3	40,1	49,4
= % of Europe	2,7%		2,4%	2,3%	2,4%	2,8%

N/FIN/S (Dänemark raus)

summary	2015	>>>	2019	2020	2021	2022
revenues (million €)	58,1		53,9	41,5	36,5	44,5
= % of Europe	3,2%		3,1%	2,7%	2,2%	2,5%

CZ/H/PL/RO/SK/SLO

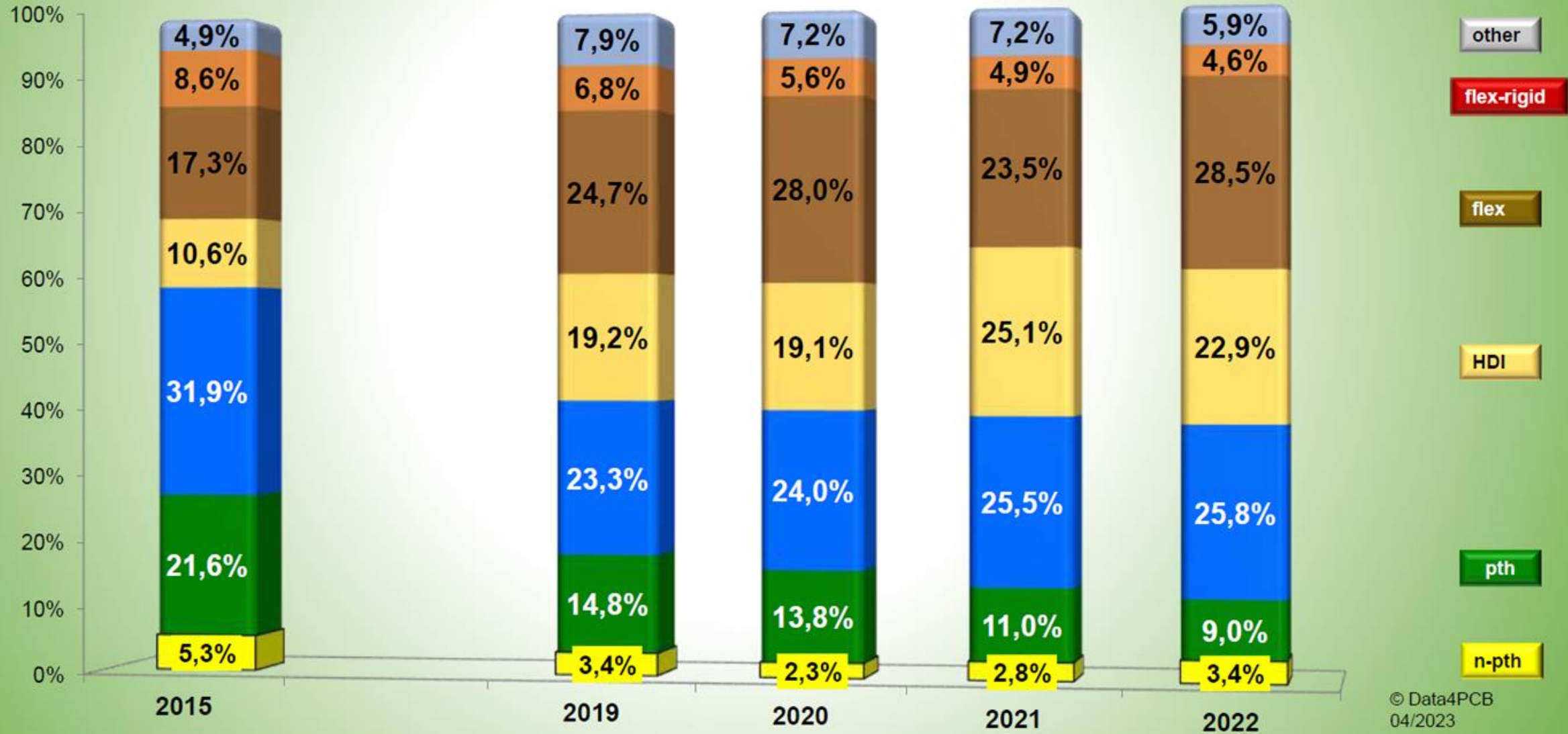
summary	2015		2019	2020	2021	2022
revenues (million €)	79,4		82,8	75,6	83,2	86,2
= % of Europe	4,4 %		4,7%	5,0%	5,0%	4,9%

Top manufacturers in Austria and Switzerland 2022 *)
> 10 million annual sales

1	AT & S / A
2	GS Swiss PCB / CH
3	Dyconex / CH
4	KSG Austria / A
5	Varioprint /CH
6	Optiprint / CH
7	Cicor PCB Group / CH

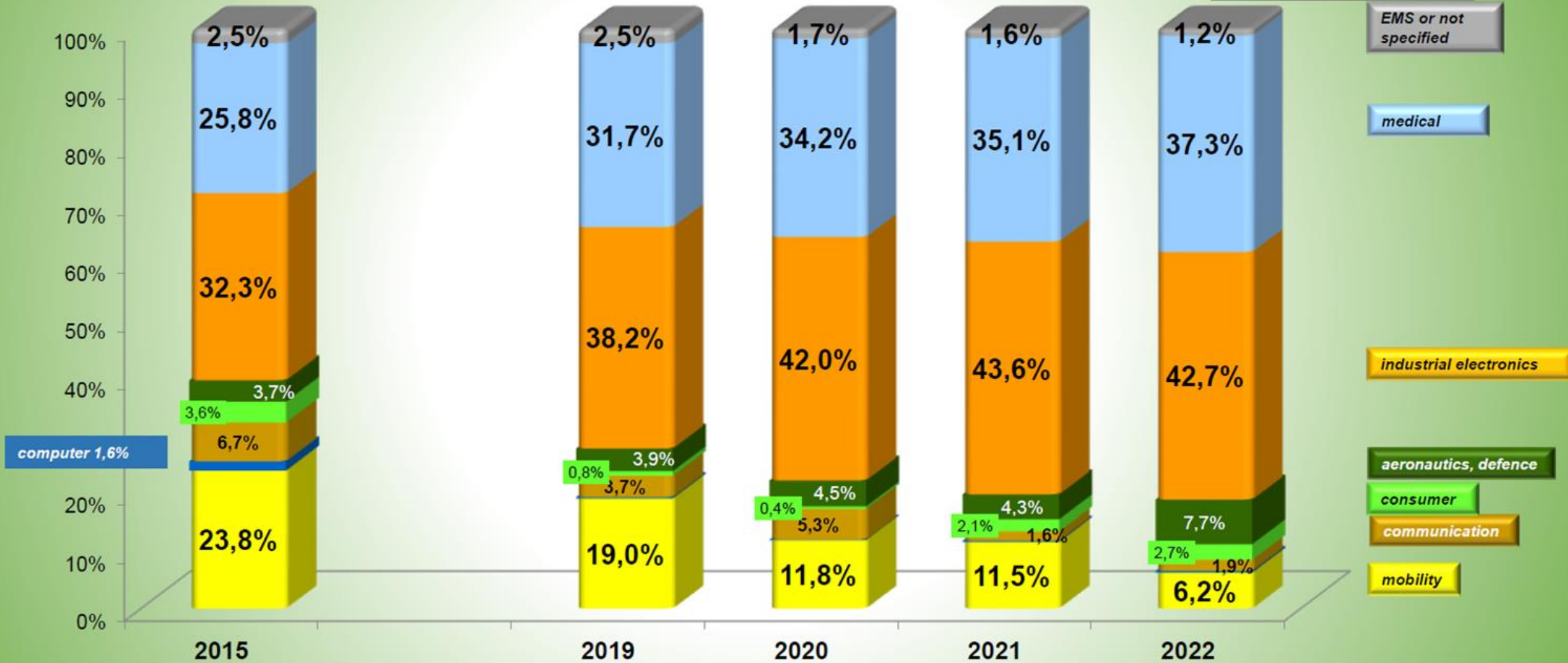
*) production in Austria / Switzerland 2022 only

Austria and Switzerland: distribution of technologies



Austria and Switzerland: industries served

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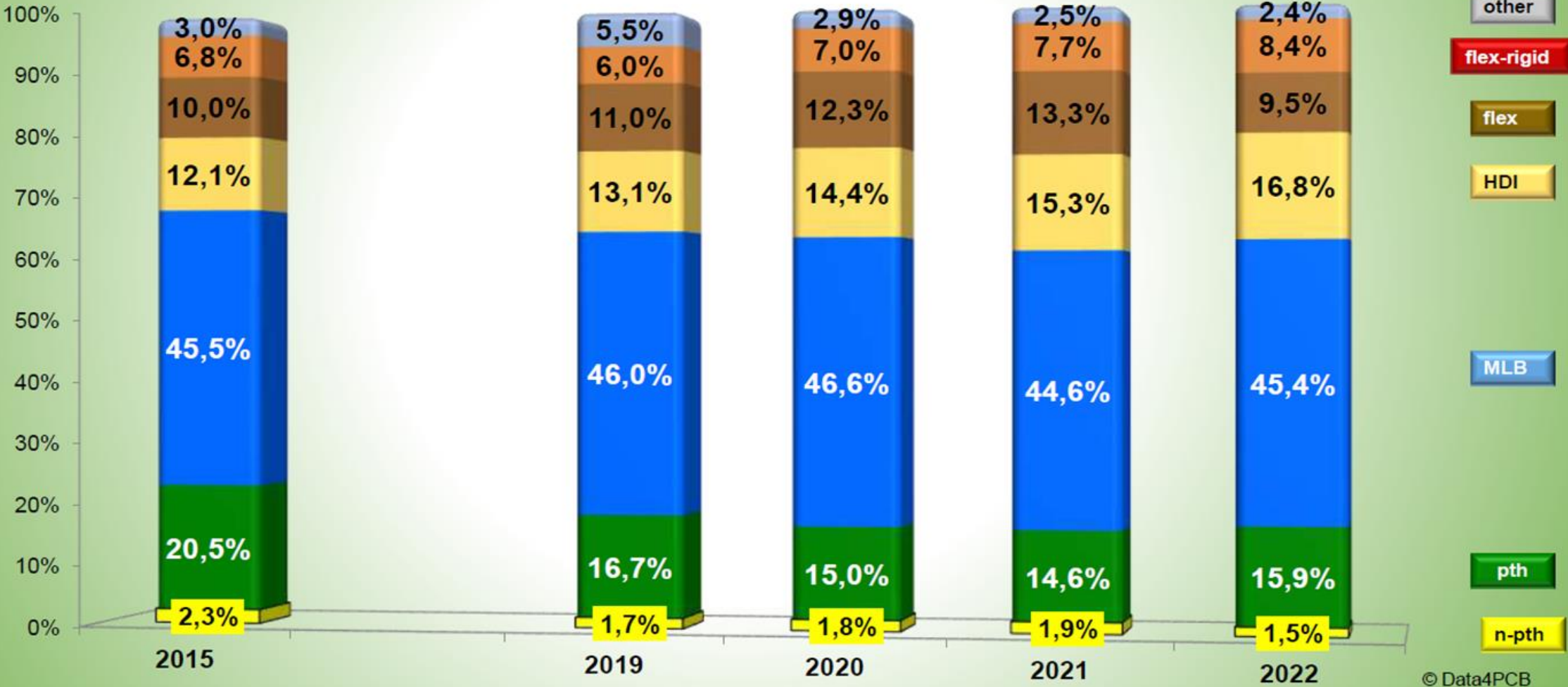
Top companies 2022 in Germany *)
> 10 million annual sales

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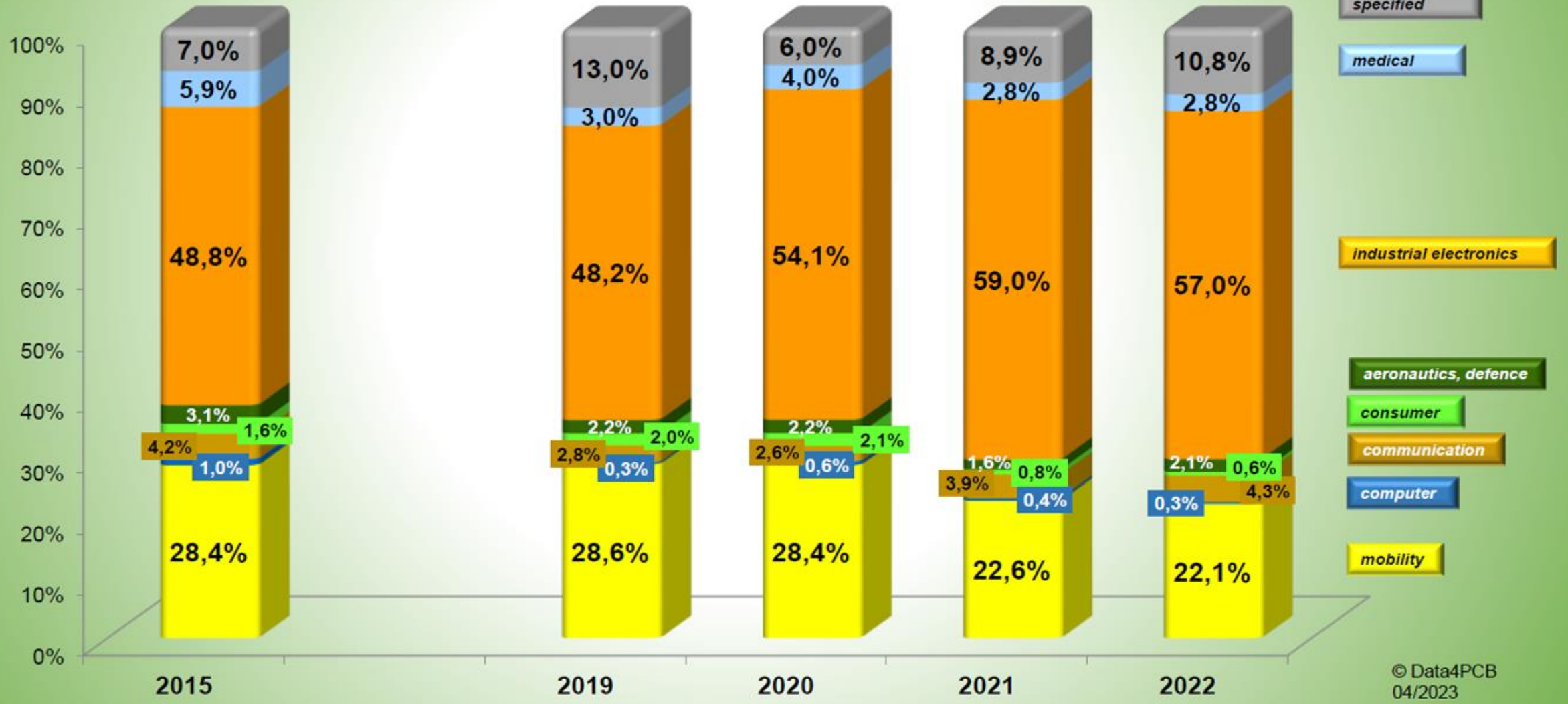
1	Würth	9	Schaltungsdruck Storz
2	KSG / D	10	Lüberg
3	Schweizer Electronic	11	Ilfa
4	Unimicron Germany	12	tw-elektric
5	Mektec Europe	13	Precoplat / Microcirtec
6	hmp Heidenhain	14	Elekonta Marek
7	Polytron Print	15	Jenaer Leiterplatten
8	Rohde & Schwarz		

*) production in Germany 2022 only / no trade

Germany: distribution of technologies



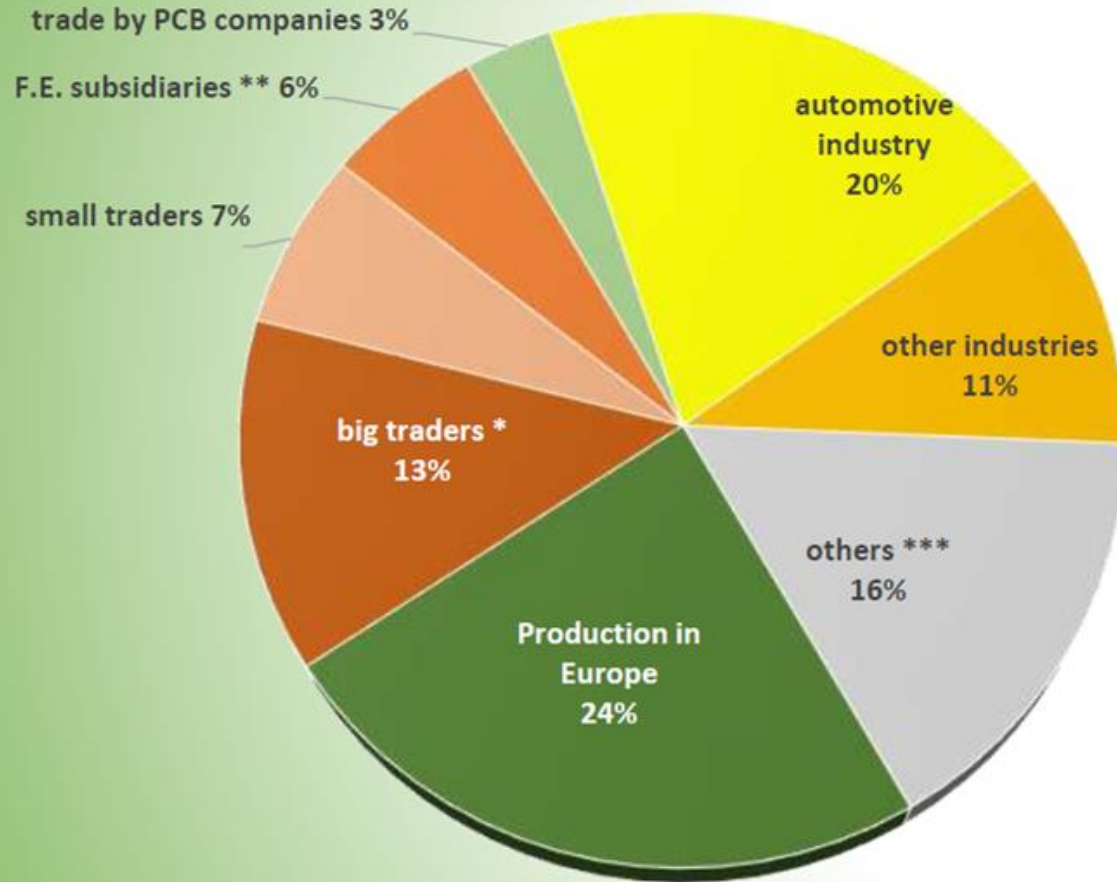
Germany: industries served



The European PCB market

- a VERY rough estimate -

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The total market volume in Europe is estimated to reach about 7.500 million EUR

production in Europe: 1.800 mEUR

* big traders (NCAB etc) 1.000 mEUR

small traders 500 mEUR

** subsidiaries of F.E. manufacturers in Europe 450 mEUR

trade by European PCB manufacturers 250 mEUR

import automotive industry to Europe 1.500 mEUR

other industries 800 mEUR

*** others (European countries of which no data are available) 1.200 mEUR

...and most of the imports from regions outside Europe originate from China

SWOT-Analyse Leiterplatte Europa

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Longstanding OEM-EMS-PCB relationships• Technical capabilities• Prototyping capabilities• Skilled workforce• Lead times• Data security	<ul style="list-style-type: none">• Cost• Manufacturing capacity• Regional supply chains for base materials• Engagement with the global supply chain• Regional supply chains for chemistries• R&D investment
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Economy-wide green transition• Product innovation• Process innovation• Smart manufacturing / Factory of the Future• Government industrial base support	<ul style="list-style-type: none">• Cost of Labour• Lack of skilled workforce• Supply chain disruptions• Weak domestic and/or regional electronics manufacturing ecosystems• Government regulation/compliance

HOFSTETTER

PCB PLATING

Besten dank, für die Aufmerksamkeit.

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