VEREIN LEITERPLATTE SCHWEIZ

Data4PCB
European PCB Market Research

Remo Fischer
30.09.2025

Forum Leiterplatte Schweiz 2025

Marktanalyse Europa

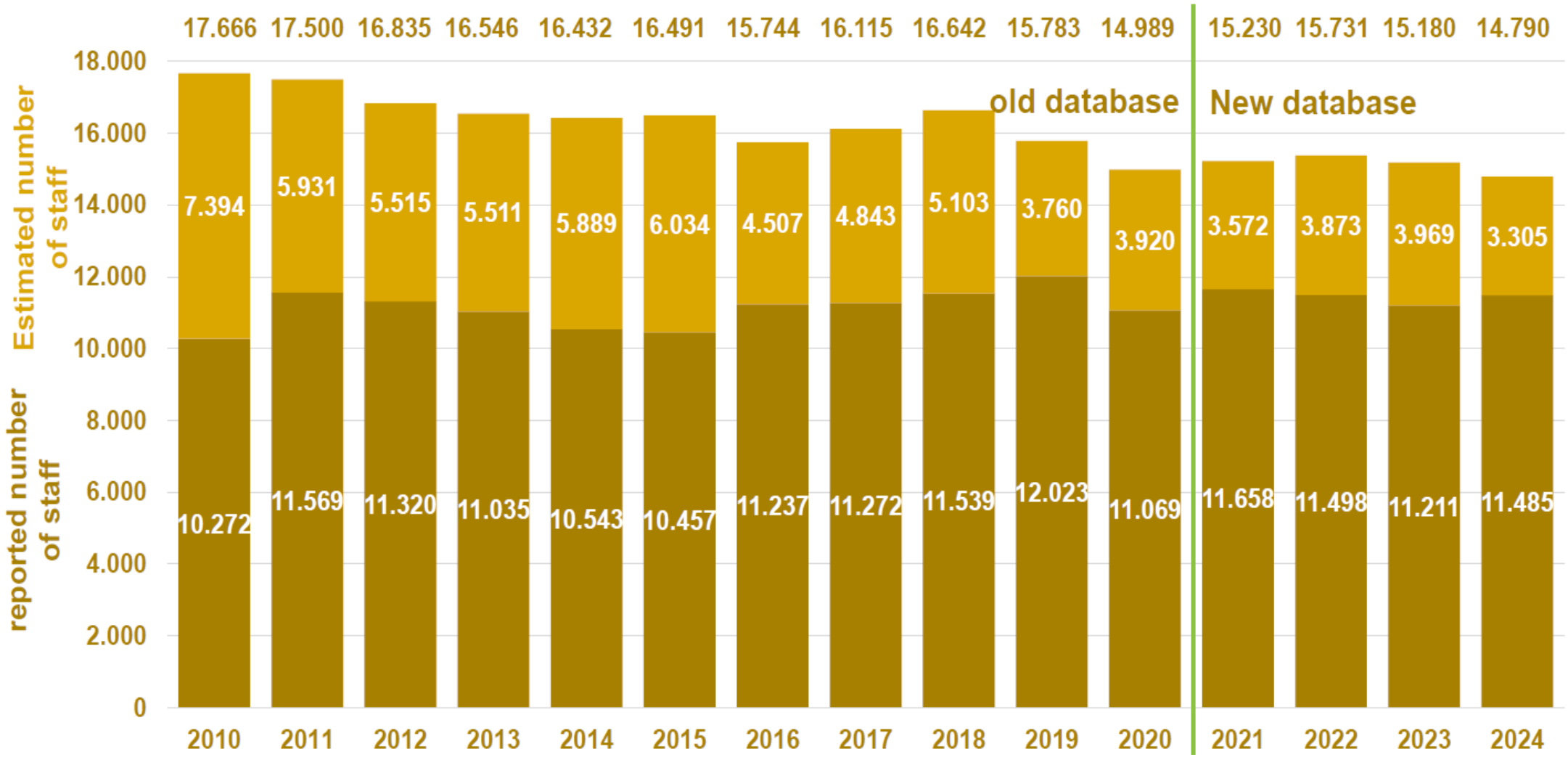
Hofstetter PCB AG, Fännring 10, CH-6403 Küssnacht am Rigi
Telefon + 41 41 850 50 50 , www.hofstetter-pcb.ch

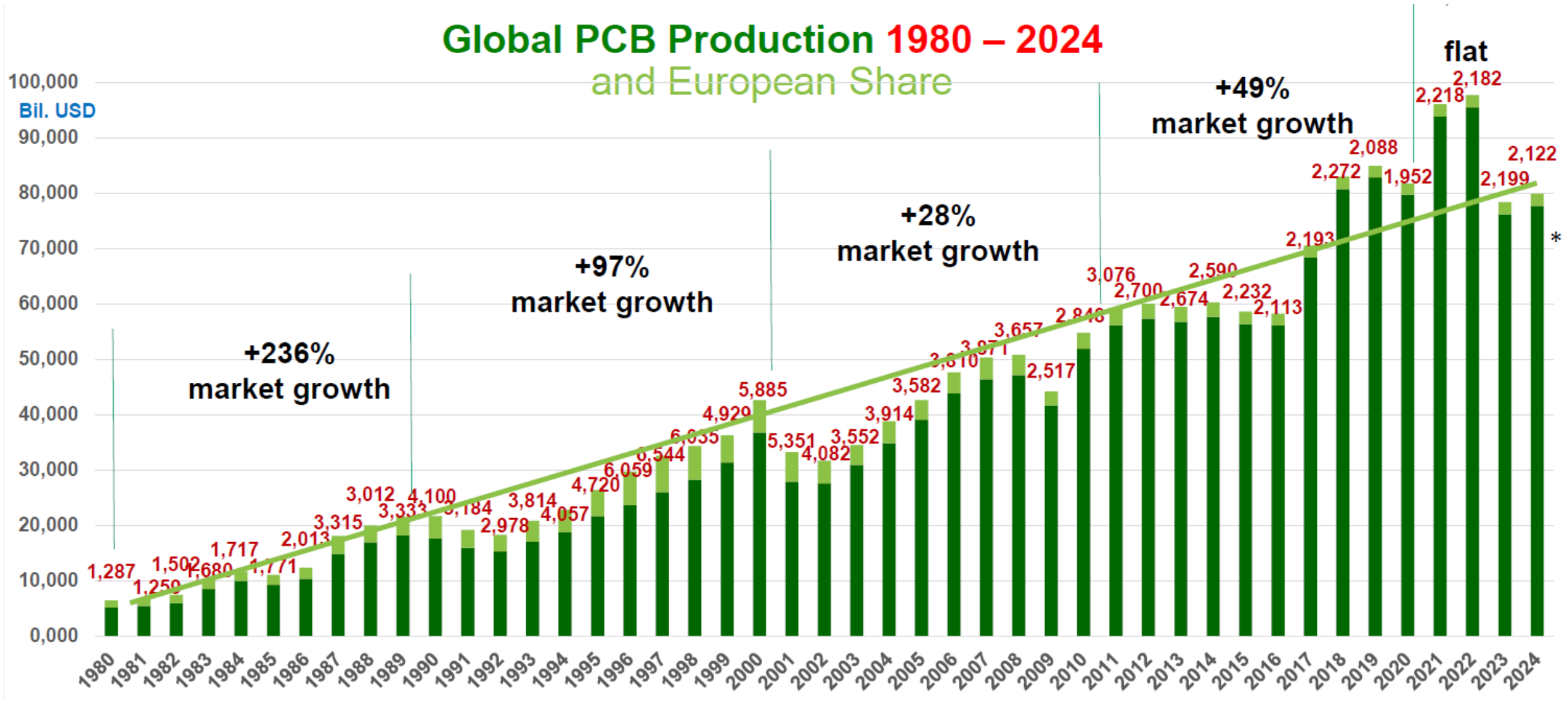
Schliessung Würth Schopfheim 2025
= Schliessung Panasonic?

European PCB production

	2021	2022	2023	2024
Revenues (million €)	1,877	1,930	1,885	1,807
Staff	15,230	15,371	15,180	14,790
> 50 million €	5	5	7	9
20-50 million €	21	22	18	15
10-20 million €	21	20	17	17
5-10 million €	34	34	37	35
2-5 million €	42	40	39	40
< 2 million €	74	69	68	66
Total *	197	190	186	182

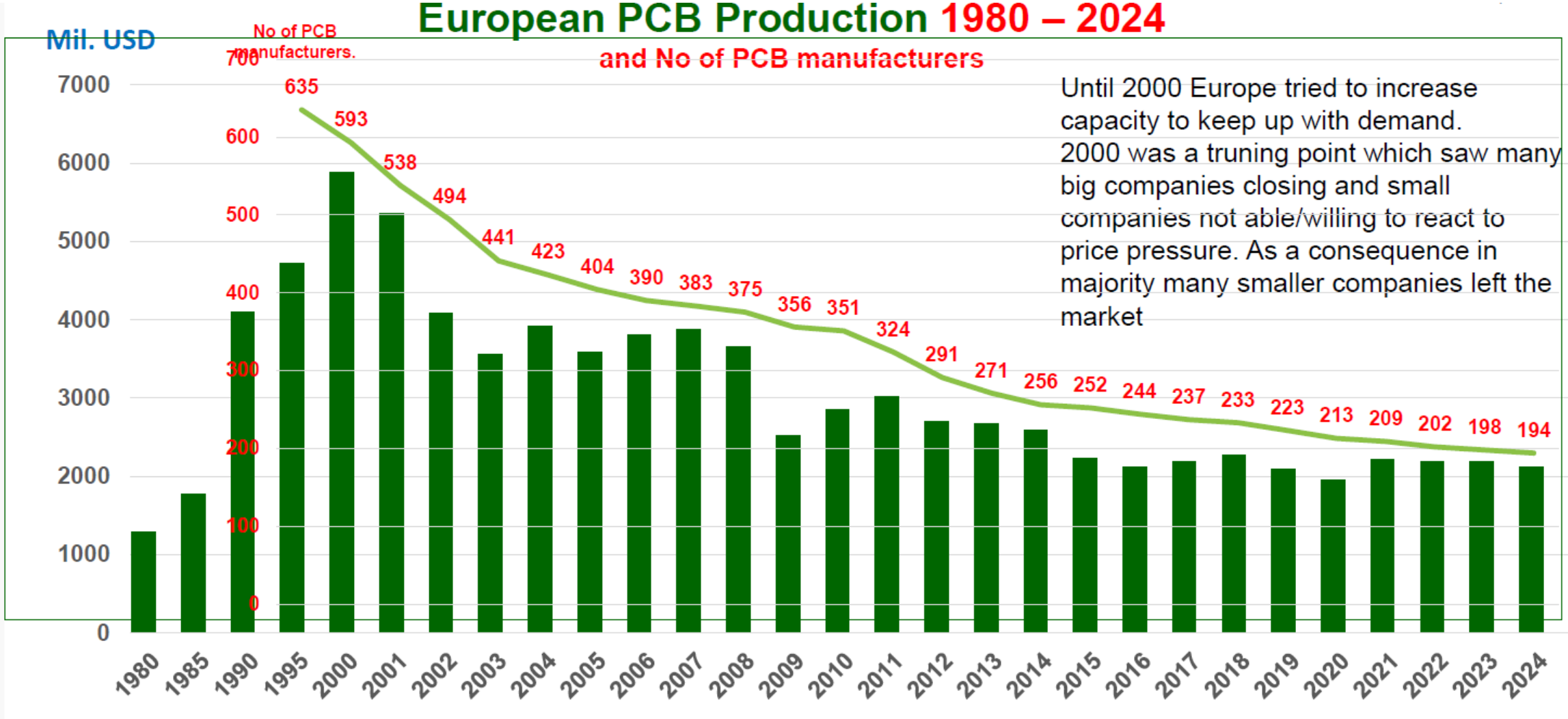
Number of staff in Europe




Global PCB Production 1980 – 2024
and European Share
Bil. USD
100,000
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0,000
+236%
market growth
+97%
market growth
+28%
market growth
+49%
market growth
flat
1,287
1,250
1,502
1,680
1,717
1,771
2,013
3,315
3,012
3,333
4,100
3,184
2,978
3,814
4,057
4,720
6,059
6,544
6,935
4,929
5,885
5,351
4,082
3,552
3,914
3,582
3,810
3,971
3,657
2,517
2,848
3,076
2,700
2,674
2,590
2,232
2,113
2,193
2,272
2,088
1,952
2,218
2,182
2,199
2,122
*
1980
1981
1982
1983
1984
1985
1986
1987
1988
1989
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024

European PCB Production 1980 – 2024

and No of PCB manufacturers



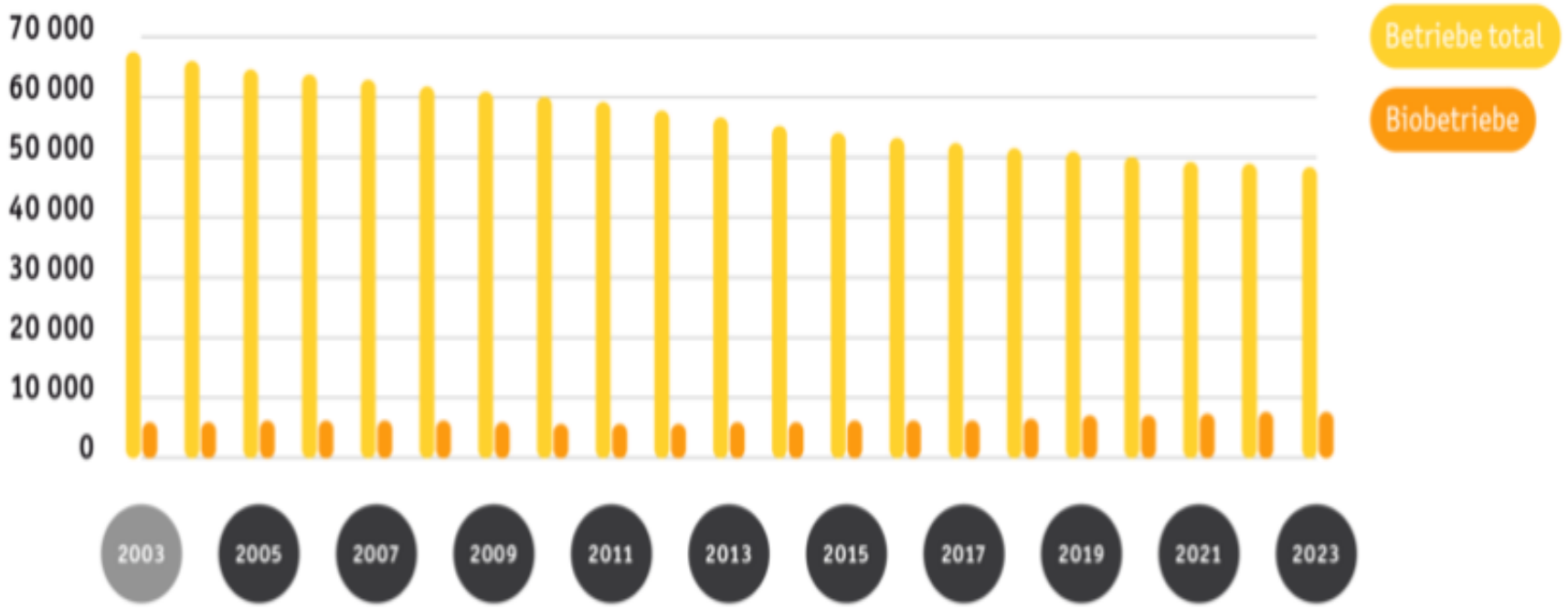
Until 2000 Europe tried to increase capacity to keep up with demand. 2000 was a truning point which saw many big companies closing and small companies not able/willing to react to price pressure. As a consequence in majority many smaller companies left the market

Frage…

Wie viele Landwirtschaftsbetriebe sind im gleichen Zeitraum verschwunden

Prozentual

Anzahl Landwirtschaftsbetriebe in der Schweiz



Landwirtschaftbetriebe

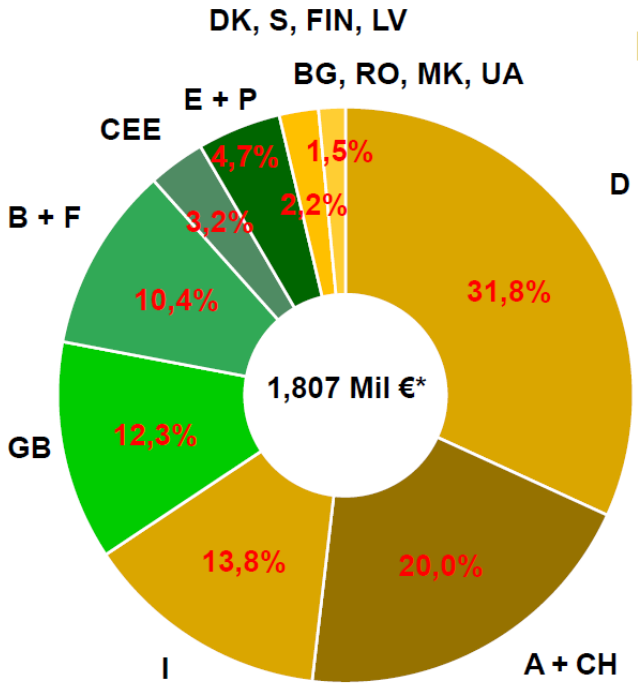
-30%

70% Existieren noch

PCB Manufacturer

-70%

30% Existieren noch



European PCB production by countries 2024

	production (M EUR)	% of Europe
Germany	572,2	31,8%
Austria + Switzerland	361,5	20,0%
Great Britain	249,6	13,8%
Belgium + France	188,8	10,4%
Central Europe	85,1	4,7%
Spain +Portugal	58,6	3,2%
Scandinav., Baltics, NL	39,3	2,2%
Rest of Europe (BG,RO, MK, UA)	27,9	1,5%

Produktion 2023

	production (M EUR)	% of Europe
Germany	675,1	40,0%
Austria + Switzerland	326,8	19,3%
Italy	203,0	12,0%
Belgium + France	165,1	9,8%
Great Britain	155,2	9,2%
Central Europe	79,4	4,7%
Spain	47,9	2,8%
Rest of Europe	37,3	2,2%

Produktion 2022

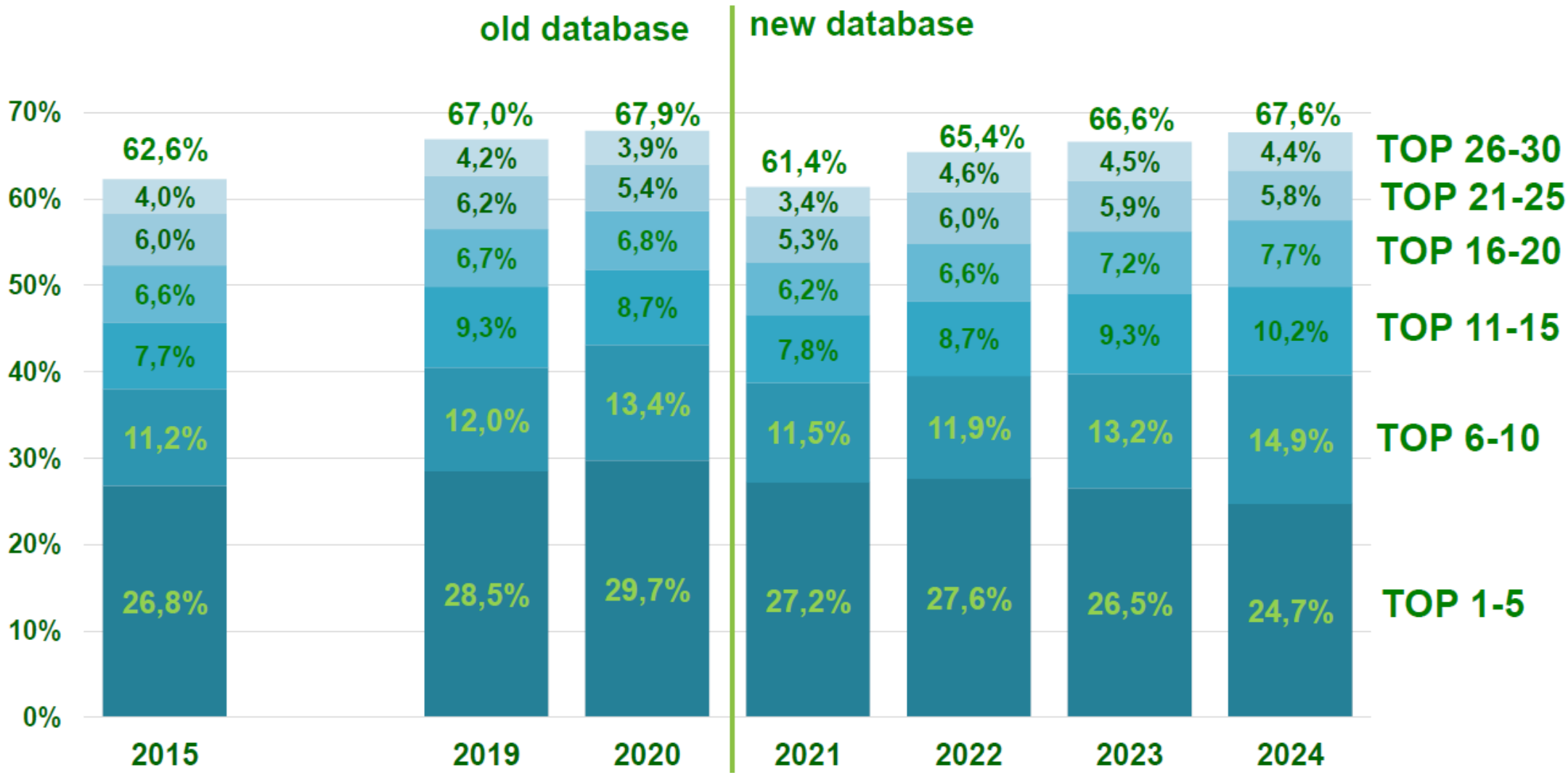
	production (M EUR)	% of Europe
Germany	740,97	42,1
Austria + Switzerland	344,06	19,6
Italy	199,16	11,3
Great Britain	152,40	8,7
Belgium + France	141,51	8,0
Central Europe	86,20	4,9
Spain	49,39	2,8
Rest of Europe	44,47	2,5

The TOP 30 PCB manufacturers in Europe 2024

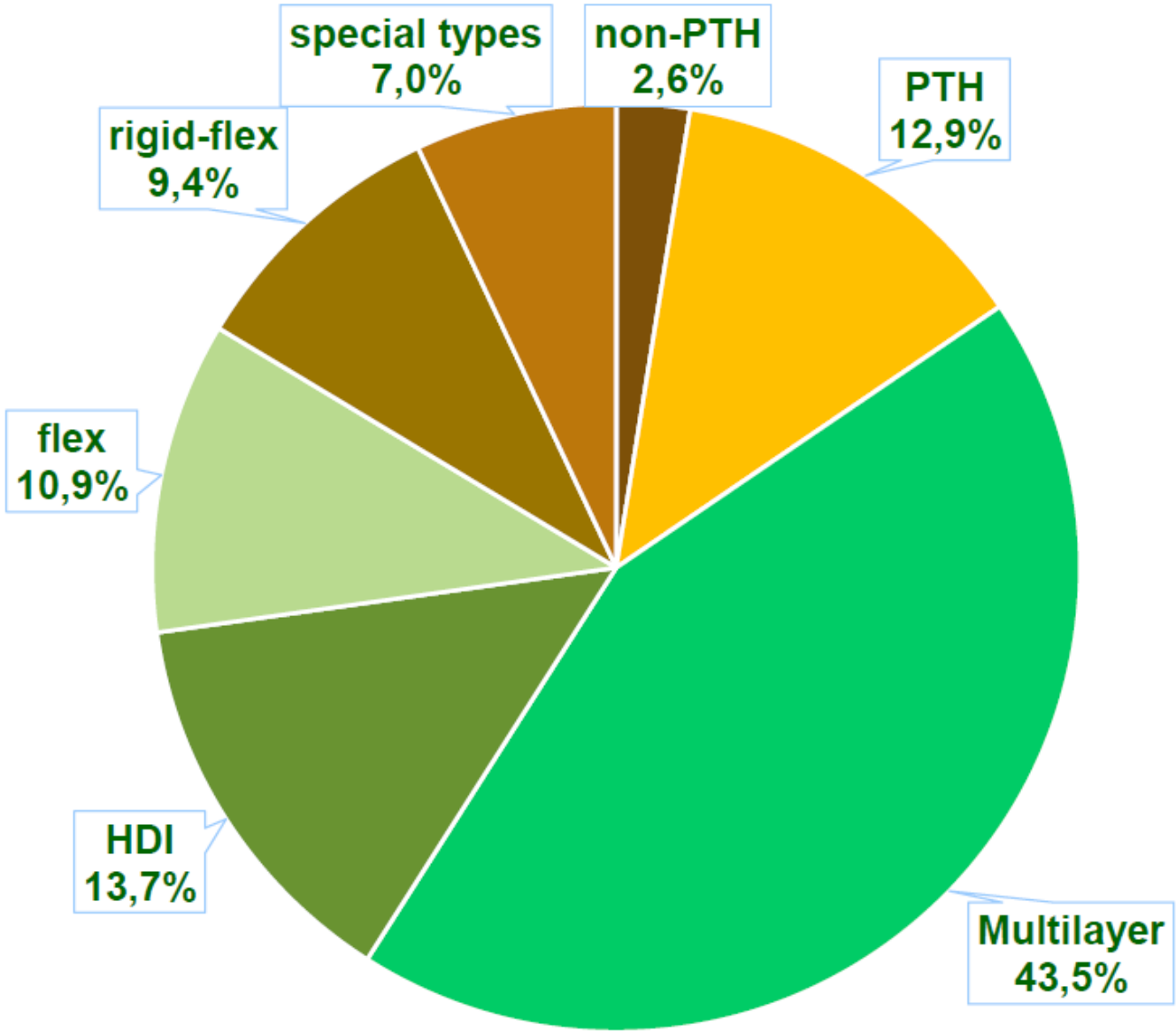
1. AT&S AG, Austria
2. Würth GmbH & Co KG Germany
3. KSG GmbH & Co. KG Germany & Austria
4. Schweizer Electronic AG, Germany
5. ELVIA Group, France
6. Dyconex AG Switzerland* 2023 Rang 9
7. SoMaCis SPA, Italy
8. GS Swiss PCB AG, Switzerland 2023 Rang 8
9. ACB NV, Belgium & France
10. Mektec Europe Germany
11. Cistelaier srl Italy, France, Germany
12. Unimicron Germany
13. Graphic plc, UK
14. Hmp Heidenhain Microprint GmbH Germany
15. Amphenol Invotec Ltd
16. Cimulec Groupe, France
17. Optiprint AG, Switzerland 2023 Rang 22
18. Eurocircuits Group, Germany & Hungary
19. Varioprint AG, Switzerland 2023 Rang 14
20. Cicor Group, Switzerland 2023 Rang 20
21. The Eurotech Group, UK
22. Aspocomp Oy, Finland
23. Lüberg Elektronik GmbH, Germany
24. Rhode & Schwarz GmbH, Germany
25. HiTech Corp., Macedonia
26. Schaltungsdruck Storz, Germany
27. Merlin PCB Group, UK
28. LAB Circuits, Spain
29. Garner Osborne Circuits Ltd.
30. Teledyne Group, UK

Share of top 30 European manufacturers

Rev.

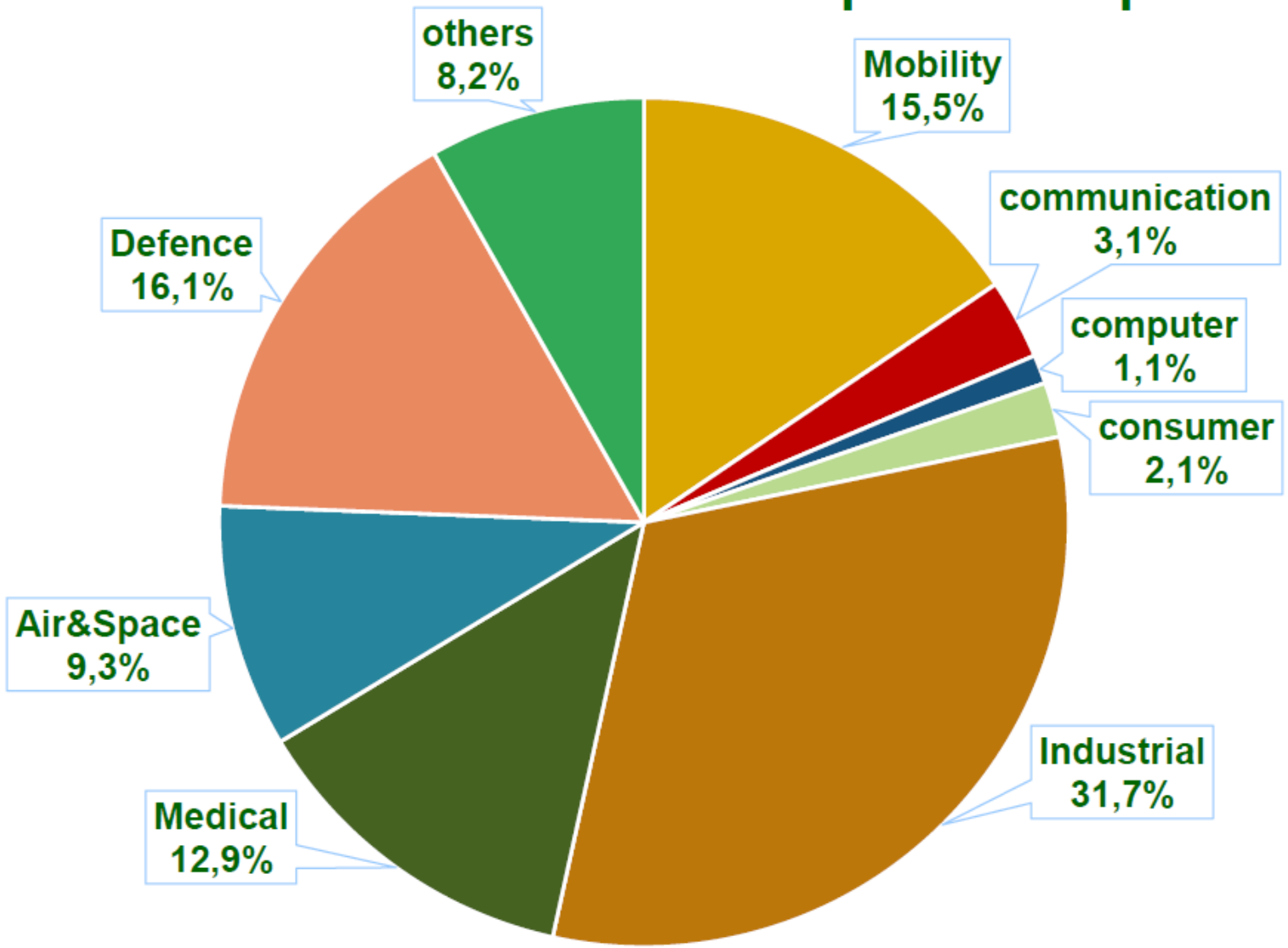


European PCB production by product type 2024



	Million EUR
Non-PTH	46.1
PTH	234.0
ML	786.6
HDI	248.4
Flex	196.1
Rigid-flex	169.1
Special Types	127.0
Total	1,807.3

European PCB production by market segment 2024



	Million EUR
mobility	280.6
Communication/Media	55.2
Computer/office automation	19.9
Consumer	37.6
Industrial Electronics	572.7
Medical Electronics	233.4
Air & Space	167.3
Defence	291.8
Others	148.8
Total	1,807.3

Air & Space increased by 15% Defence by 62%

Key data European PCB production – industries served

					old database		new database			
In million EUR	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Mobility	371.3	366.7	398.6	399.9	357.1	273.6	286.8	279.2	282.6	280.6 →
Communication	124.4	97.4	95.2	98.4	73.6	70.8	79.2	81.8	60.3	55.2 ↘
Computer	28.8	28.4	25.9	28.5	15.0	16.9	17.3	17.1	22.2	19.9 →
Consumer	52.5	45.8	38.5	47.9	39.4	40.6	47.4	48.1	51.2	37.6 ↘
Industrial electronics	749.5	704.3	730.2	770.6	721.4	661.4	875.8	837.8	730.4	572.7 ↓
Medical electronics	163.3	167.4	152.8	144.0	147.5	152.6	182.8	203.1	225.2	233.4 ↗
Air/Space electronics	89.1	92.0	103.3	101.0	89.6	65.5	72.0	96.9	145.0	167.3 ↑
Defence electronics	143.9	138.2	150.4	142.4	155.3	129.1	149.9	166.4	180.6	291.8 ↑
others	92.5	107.2	136.2	188.0	165.1	102.8	165.5	199.8	164.5	148.8 ↘
Total PCB production	1,814.5	1,747.4	1,831.1	1,920.7	1,764.0	1,513.3	1,876.7	1,930,2	1,884.5	1,807.3

Key data European PCB production – technologies

					old database		new database			
In million EUR39	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Non-pth	70.5	54.9	60.4	63.0	54.9	40.1	54.9	56.8	48.5	46.1
Pth	383.1	344.8	341.1	363.1	301.5	237.6	289.4	299.5	301.5	234.0
MLB	777.1	717.3	752.2	767.0	721.5	624.5	780.2	826.8	799.1	786.6
HDI	209.1	215.9	230.5	251.9	238,9	208.1	286.8	289.1	261,5	248.4
Sub-total rigid	**1439.8**	**1332.9**	**1384.2**	**1445.0**	**1316.8**	**1110.3**	**1411.3**	**1472,2**	**1410.6**	**1315.1**
Flexible	113.2	113.4	128.6	138.3	126.0	59.6	82.6	80.2	66.2	53.1
Flexible ML	9.5	13.6	11.4	10.8	11.0	8.9	8.9	9.5	15,8	27.0
Flexible w. microvias	21.0	19.8	11.7	8.3	7.7	66.4	73.8	60.4	72,4	74.1
Flexible ML w. microvias	24.5	36.0	44.1	47.7	57.1	61.5	64.2	68.6	74.7	41.9
Sub-total flexible	**168.2**	**182.8**	**195.8**	**205.1**	**201.8**	**196.4**	**229.5**	**218.7**	**229.1**	**196.1**
Rigid-flex	125.0	111.9	131.1	114.6	123.3	86.4	84.2	122,0	102.8	109.1
Rigid flex w. microvia	19.0	25.7	16.9	40.9	15.4	45.6	69.2	42.3	51.6	60.0
Sub-total rigid-flex	**144.0**	**137.6**	**148.0**	**155.5**	**138.7**	**132.0**	**153.4**	**165.3**	**154.4**	**169.1**
IMS	28.1	52.4	44.5	44.2	42.1	35.8	38.5	32,9	30.1	33.1
Others	34.4	41.7	58.6	70.9	64.6	38.8	44,0	41,1	60.3	93.9
Sub-total others	**62.5**	**94.1**	**103.1**	**115.1**	**106.7**	**74.6**	**82.5**	**74.0**	**90.4**	**127.0**
Total PCB production	**1,814.5**	**1,747.4**	**1,831.1**	**1,920.7**	**1,764.0**	**1,513.3**	**1,876.7**	**1,930,2**	**1,884.5**	**1,807.3**

720

Wem sagt die Zahl etwas?

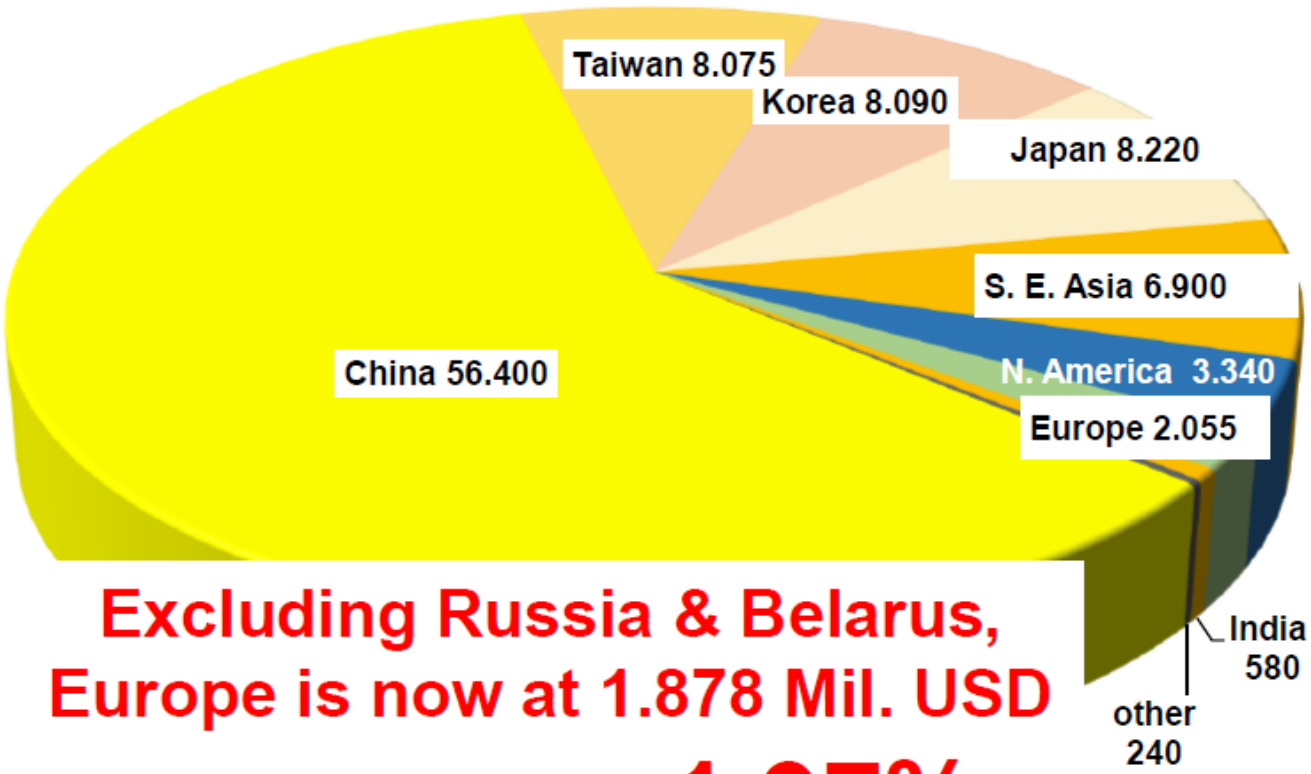
Europäisches Parlament

Kosten Parlament = 2`600`000`000

OLIVE OIL
EU

Global PCB production 2024 (in million USD)

Based on data supplied by Dr. Hayao Nakahara



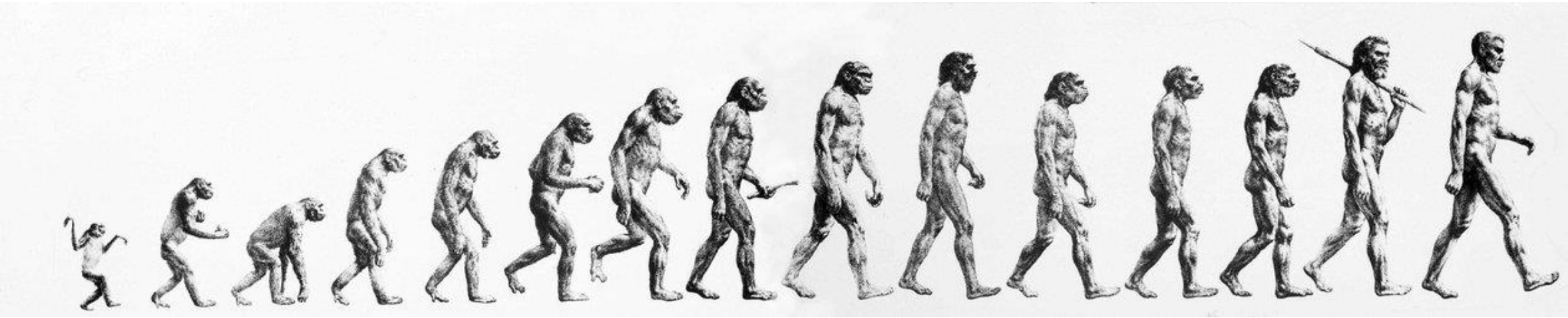
Excluding Russia & Belarus, Europe is now at 1.878 Mil. USD

a global share of 1,97%

	in million USD	In % 2024	Growth to 23 in %
China	56.400	59.2%	4.4%
Taiwan	8.075	8.5%	5.6%
Korea	8.090	8.5%	4.3%
Japan	8.220	8.6%	5.6%
Thailand	3.600	3.8%	18.0%
Vietnam	3.300	3.5%	13.8%
India	580	0.6%	3.6%
Other Asia	1.320	1.4%	14.8%
N. & S. America	3.340	3.5%	4.0%
Europe*	2.050	2.2%	-2.8%
MENA	240	0.2%	20.0%
Total	95.215	100%	5.4%

*** including Russia & Belarus**

Leben ohne Elektronik



- Wie weit zurück geht es?
- Wie bedeutungslos wird Europa Weltpolitisch?
- Wer übernimmt die politische Macht in Europa? USA oder China?
- Unter welchen Umständen arbeiten wir in 20 Jahren?
- Wo steht die EU bezüglich KI
- **Klappt die Kehrtwende noch?**

Europa

HOFSTETTER
PCB PLATING

Besten dank, für die Aufmerksamkeit.

Hofstetter PCB AG
Fännring 10
CH-6403 Küssnacht

Phone +41 41 850 50 50
Fax +41 41 850 55 50

www.hofstetter-pcb.ch