

High-end Copper Foil - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The High-end Copper Foil Market is expected to register a CAGR of greater than 6% during the forecast period.

Key Highlights

- Circuit board applications dominate the market and are expected to grow at a moderate rate during the forecast period, owing to the increasing demand for consumer gadgets like smartphones, PCs, tablets, and other medical electronics products.
- Copper foils in transformer and grid-level energy storage are likely an opportunity.
- The development of single-crystal graphene sheets as a substitute for copper foil is expected to hinder the market's growth.
- Asia-Pacific dominated the market across the world, with the most significant consumption from countries such as China and India.

High-End Copper Foil Market Trends

Increasing Demand for Circuit Boards

- Most of the electronics products manufactured contain printed circuit boards (PCBs). High-quality PCB manufacturing technology allowed electronics product manufacturers to produce smaller, more complex products. It is the key to today's dynamic and rapidly progressing electronic innovations.
- The substrate used to manufacture printed circuit boards is fiberglass-reinforced epoxy laminate. Epoxy resin includes a copper foil bonded to one or both sides.

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- Two main types of copper foil are used in PCBs: electrodeposited and rolled copper foil. Both these types have many possible variations, with the most choices available for ED copper. Copper foil characteristics are essential for high-frequency circuits.
- Rolled copper foil is used extensively for flexible circuit boards where a smooth surface is preferred. Electrodeposited copper foils are used in rigid, flexible circuits.
- The demand for consumer gadgets, such as smartphones, PCs, tablets, and other medical electronics products, is rapidly increasing globally, with India and China expected to remain at the top of market growth. As printed circuit boards are deployed in almost all electronics products, it will likely drive the demand for high-quality copper foil in the coming years.
- There are 2687 PCB plants worldwide, with China having 55%. Since 2020, the prices of all PCB materials, including copper-clad laminates, have been growing, while PCB prices have increased less sharply. It made the PCB sector in China increasingly unprofitable. The low-profit PCB sector may benefit from power cutbacks by reducing the surplus capacity.
- Over 51% of the PCBs are manufactured in China, owing to the offering of huge incentives by the government to the PCB factories. China is also producing these circuit boards at a meager cost. As a result, many companies across the world are closing their operations.
- The United Kingdom used to have over 300 PCB factories over the last decade, but it is now reduced to less than 35. South Africa is also experiencing the same effects due to increased raw materials and labor costs.
- According to IPC, PCB shipments from North America increased by 26.1% while comparing November 2022 to the same month in the previous year. Shipments in November increased by 13.1% over the last month.
- All the above factors are expected to drive the market for high-end copper in the coming years.

Asia-Pacific Region to Dominate the Market

- The Asia-Pacific region dominated the global market share due to the increasing production activities in countries, including China and India.
- More than 50% of PCBs are manufactured in China, owing to the huge incentives offered by the government to PCB factories.
- According to the India Energy Storage Alliance (IESA), the Indian EV market would grow at a CAGR of 36%. According to the Ministry of Heavy Industries, 0.52 million EVs have been registered in India during the previous three years. EVs had strong growth in 2021, aided by the government's adoption of beneficial laws and initiatives.
- For encouraging e-2W use, the demand incentive raised under the FAME-II scheme from INR 10,000/KWh (USD 122.60/KWh) to INR 15,000/KWh (183.90/KWh), with a cap rise from 20% to almost 40% of vehicle cost. Additionally, the FAME-India Scheme's Phase II was extended for an additional two years beginning on March 31, 2022. It would, in turn, promote the growth of the studied market during the forecast period.
- Currently, 35% of India's PCB need is met by domestic production while being dependent on imports for the remaining 65%. India presently produces both populated and bare PCBs. The current market size for the latter is around US\$ 1.2 billion, with 30% of that market's production occurring in India.
- The PCB manufacturers in South Korea have advanced technical skills, which will likely benefit the high-end copper foil market. These manufacturers have won orders for PCB from Apple. TAESUNG is the leading company dealing with PCB for Apple manufacturing.
- According to KPCA (Korean Printed Circuits Association), South Korea occupies 13% of the PCB market, which is the second largest in the world behind China (49%), followed by Taiwan (12%) and Japan (8%).
- The factors above, coupled with government support, contribute to the increasing demand for high-end copper foil consumption in the region during the forecast period.

High-End Copper Foil Industry Overview

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The high-end copper foil market is partially consolidated, with the top five players accounting for a considerable chunk of the market. The major companies include (not in any particular order) Mitsui Mining & Smelting Co. Ltd, Furukawa Electric Co. Ltd, Sumitomo Metal Mining Co. Ltd, Doosan Corporation, and Wieland Group, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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