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# CHINA SMT CAPACITY STUDY

***2020 Edition***

**Vendor – Buyer Database of SMT Assembly Lines**

**2016 – 2019**

## Report Highlights

- **World SMT Line Installed Base by Country/Region**
- **China SMT Line Installed Base (detailed)**
  - ◆ **SMT Line Installed Base by Province**
  - ◆ **SMT Line Installed Base by Vendor**
  - ◆ **SMT Line Installed Base by Business Model**
  - ◆ **SMT Line Installed Base by End Customer**
  - ◆ **Data Supported by Hundreds of Factory Audits**
- **Database Directory Sorting Categories: (Equipment Brand, Model, Segment, Unit Price USD, Total Price USD, Mounters (units), Parent Company, Subsidiary/Site, Buyer Region, Buyer Company Type, Buyer Address, Buyer Province, Company Type, SMT Lines (units), Employees, Total Mounters Purchased (2016-2019), Audits, Comments**

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# China SMT Capacity Study - 2020 Edition

## Synopsis

Based on a historical analysis of Surface Mount Technology (SMT) market data, **New Venture Research (NVR)** recently established that the worldwide installed base of SMT lines approximates 70,176 in 2019, probably increasing to 73,231 in 2020, despite the Coronavirus crisis. Together, these SMT lines annually process up to 8 trillion active and passive components that populate some 33 billion printed circuit boards, which form the heart of our Smart Phones, Notebooks, FTVs and future IoT applications.

Roughly 70% of the installed SMT capacity represent High-End assembly lines, composed of increasingly integrated, modular Chip Shooting and Multifunction Placement platforms which are capable of mixed IC / PCB assemblies. The remaining 30% consist of lower performance machines. Capex requirements per SMT line vary widely, but, on average, range from US\$ 1.2 million on the low end to US\$ 2.8 million on the high end.

Worldwide SMT capacity has grown at a cumulative aggregate rate of 6% during the past five years, with China capturing more than 50%, in real terms. Taking into account a normal replacement cycle and initial purchases of new SMT lines, China now accounts for 47% of all installed SMT lines, up from 19% in the year 2000, thus dwarfing the former manufacturing centers of America, Europe and Japan.

While this should no longer surprise anyone active in the electronics manufacturing sector, to date, even industry experts continue to wonder who provides this capacity, and, more importantly, who absorbs it to manufacture the advanced products demanded by an increasingly global market. The industry structure in China remains far from transparent, with a complex mix of parent companies and subsidiaries, whose names still sound exotic and often go unnoticed, with significant opportunity costs in terms of business development.

**NVR** has followed this industry for over 25 years and is pleased to offer our latest update on this continually expanding market. **China SMT Capacity Study – 2020 Edition** is the most comprehensive market research report available on the SMT industry. This unique database, dedicated to China, that relates almost 1,000 parent companies and 1,800 subsidiaries, many of which designated High Tech Enterprises, operating in various Free Trade Zones and Tech Parks.

During the period 2016-2019, these OEMs, ODMs, EMS providers, PCB manufacturers, Component suppliers and Semiconductor assembly companies imported almost 60% of China's automatic placement machines from 40 SMT (mounting) and FCB (bonding) equipment vendors.

Using an exclusive set of customs data, we tracked and traced each shipment of new versus used SMT mounters and FlipChip bonders, including their invoice value, relating vendor to buyer. We subsequently identified parent companies and subsidiaries, PCB assembly sites, and the number of SMT lines installed in each city and province. We double checked the outcome against several hundreds of highly detailed factory audits to ensure an overall accuracy ratio of at least 80%.

The final result is a very comprehensive database that comes full circle (360°) in providing a perfect (100%) market view, which permits both general overviews and detailed drill down analyses around multiple pivot points: equipment provider, product model, product category, product configuration, mounter units, unit price, customer destination, company type (state-owned, collective, private, foreign, JV), number of SMT lines, number of employees and even contact details.

This database is an excellent tool for corporate executives and business development staff employed by a wide variety of electronics manufacturing companies interested in SMT capacity development in China, from a competitive point of view. It enables them to drill down and rank hundreds of competitors, big and small, qualifying their SMT capacity and factory expansion plans. Additionally, the database is highly useful to SMT and FCB equipment vendors interested in boosting marketing and sales to electronics manufacturers in China. It enables them to drill down hundreds of OEMs, ODMs, EMS providers and other potential customers, assess their SMT capacity, future demand, as well as share of wallet held by existing competitors.

**China SMT Capacity Study - 2020 Edition** is the product of hundreds of hours of research. The Excel database sells for \$3495, with extra single-user licenses at \$500 and a corporate license at \$1500.

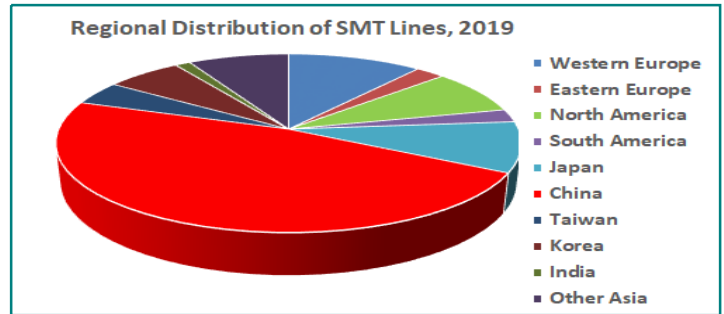
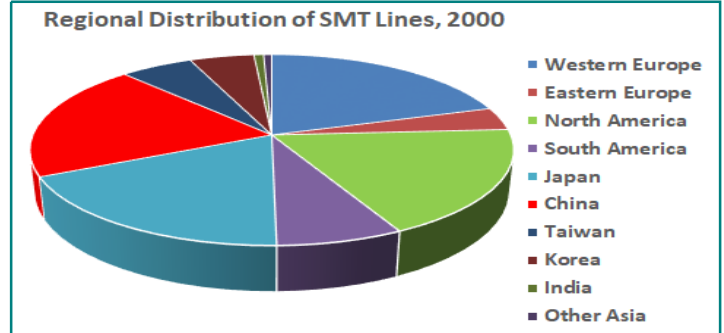
## About Us

**NVR** was formed in 1988 to assist industry executives in their decision making. We began as an independent consultancy and have recently evolved into a publisher of off-the-shelf market research reports in key areas of the electronics industry. The reports are written by a team of staff analysts and independent consultants. We also offer consulting services when our clients need information not found in our reports. We are dedicated to providing our customers with accurate reporting on our targeted markets. One of our reports can save our customers months or years of research. The reports enable executives to make decisions in a structured manner. Our customers tell us these reports are excellent tools for building consensus regarding their company's real market opportunities.

# China SMT Capacity Study - 2020 Edition

## Sample Charts and Database Tables

Database Record Categories	
Brand	Buyer Company Type
Model	Buyer Address
Segment	Buyer Province
Unit Price USD	Company type
Total Price USD	SMT lines (units)
Mounters (units)	Employees
Parent company	Total mounters purchased, 2016-2019
Subsidiary / Site	Audits
Buyer Region	Comments



Sample of Leading Companies (Parent) and Subsidiaries			
Parent/Subsidiary Company	SMT Lines	Parent/Subsidiary Company	SMT Lines
Foxconn Technology Group	XXX	ZTE Corp.	XXX
Hongfujin Precision Electronics (Zhengzhou) Co., Ltd.	XXX	Shenzhen Zhongxing Telecommunication Equipment Corporation (Shenzhen)	XXX
Hongfujin Precision Electronics (Yantai) Co., Ltd.	XXX	Shenzhen Zhongxing Kangxun Electronics Co., Ltd. (Shenzhen)	XXX
Futaihua Industry (Shenzhen) Co., Ltd.	XXX	Xi'an Zhongxing Communication Terminal Technology Co., Ltd.	XX
Hongfujin Precision Electronics (Chengdu) Co., Ltd.	XX	Shenzhen Zhongxing Kangxun Electronics Co., Ltd. (Heyuan)	XX
General Interface Solution (GIS) Holding Ltd.	XX	Others etc...	XXX
Hongfujin Precision Electronics (Yantai) Co., Ltd.	XX		
Kunshan Fuchengke Precision Electronics Co., Ltd.	XX	Matsushita Electric Industrial Co., Ltd.	XXX
Ennoconn Corp.	XX	Matsushita Electric & Electrical (China) Co., Ltd.	XX
Hongfujin Precision Industry (Shenzhen) Co., Ltd.	XX	Matsushita Automotive Systems Dalian Co., Ltd.	XX
SunWin Technology (Shenzhen) Co., Ltd.	XX	Xiamen Matsushita Electronic Information Co., Ltd.	XX
Foxlink Image Technology Co., Ltd. (Dongguan)	XX	Others etc...	XX
Others	XXX		
		Wistron Corp.	XXX
Pegatron Corp.	XXX	Weixin Capital (Kunshan) Co., Ltd.	XX
Shishuo Electronics (Kunshan) Co., Ltd.	XX	Wistron Capital (Zhongshan) Co., Ltd.	XX
Xu Shuo Technology (Chongqing) Co., Ltd.	XX	Wistron Capital (Chengdu) Co., Ltd.	XX
Mingshuo Computer (Suzhou) Co., Ltd.	XX	Wistron Capital (Chongqing) Co., Ltd.	XX
Changshuo Technology (Shanghai) Co., Ltd.	XX	Wistron Capital (Kunshan) Co., Ltd.	XX
Others etc...	XXX	Others etc...	XXX

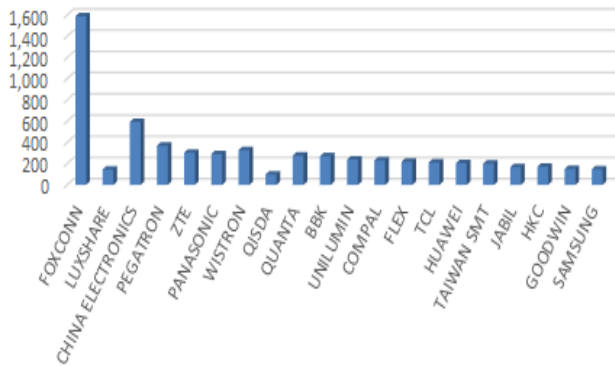
### Some Leading SMT End-Users in China

- |                    |                   |                 |
|--------------------|-------------------|-----------------|
| Foxconn            | UMC               | Fupeng Elec.    |
| Pegatron           | Konka Group       | Huaxun          |
| ZTE                | Lite-On           | Dahua Tech.     |
| Matsushita         | Haier Group       | AAC Acoustics   |
| Wistron            | Delta Electronics | Wong's          |
| Quanta Computer    | Gongjin           | Topband         |
| Foxconn Industrial | Jiuzhou           | Ichia Tech.     |
| BBK Electronics    | HuiZhou           | Micro-Star      |
| FIH Mobile         | Holitech          | Shennan Circuit |
| Unilumin           | Changhong         | Hua Qin         |
| Compal             | GBM               | Celestica       |
| Flex               | Inventec          | Fastprint       |
| TCL                | Desay Corp.       | LTOPTO          |
| Huawei             | IMI               | Shangyan        |
| TSMT               | Flexium           | Vtech           |
| Jabil              | Shenzhen Zowee    | SIIX            |
| CECT               | DBG Tech.         | Younyi          |
| TPV                | BYD Electronics   | Nippon Mfg.     |
| HKC                | Join-in Holding   | Nippon Mektron  |
| Goodwin            | Robert Bosch      | ACT Industrial  |
| Samsung            | Goertek           | Visteon         |
| Luxshare           | Compeq            | Multi-Fineline  |
| Lenovo             | Datan Telecom     | ECS             |
| ZDT                | Jinzhong          | CK Telecom      |
| CETC               | Huaxia            | Kinwong         |
| USI                | WKK Tech.         | Innolux         |
| Gree               | LG Electronics    | Op Lighting     |
| Hisense            | Jinli Comm        | Wistron NeWeb   |
| Clevo              | Sanmina           | Lextar          |
| Midea              | Caihuang          | Continental     |
| Murata             | Qsida             | GIGA-BYTE       |
| New Kinpo          | Salcomp           | Panda Elec.     |

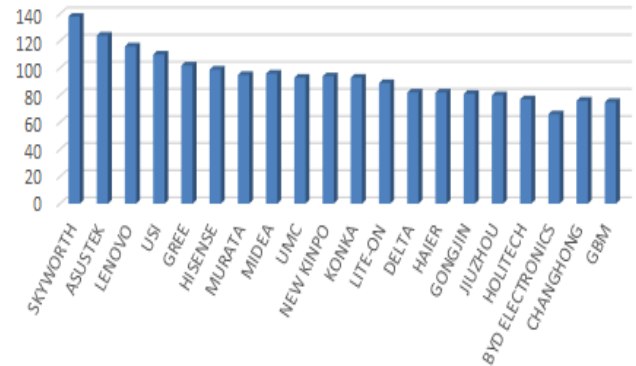
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## Sample Charts (continued)

SMT Lines Installed at PCBA Companies (1-20) in China, 2019



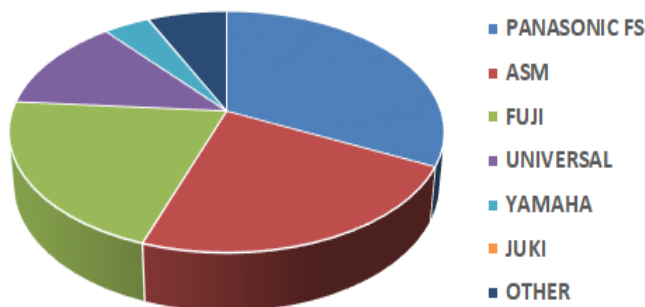
SMT Lines Installed at PCBA Companies (21-40) in China, 2019



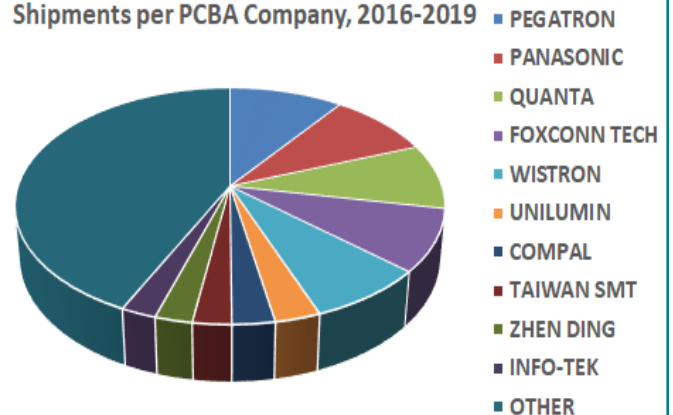
One can sort this for 1,800 PCBA houses, covering ±60% of the total market in China!

One can sort this for 40 SMT and FCB vendors, covering ±60% of the total market in China!

PCBA Company - Foxconn Tech Shipments per SMT Vendor, 2016-2019

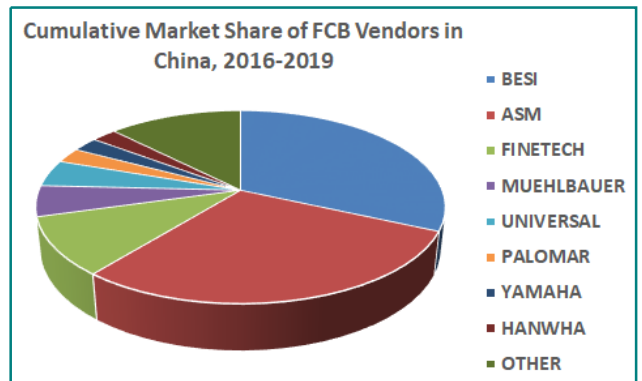
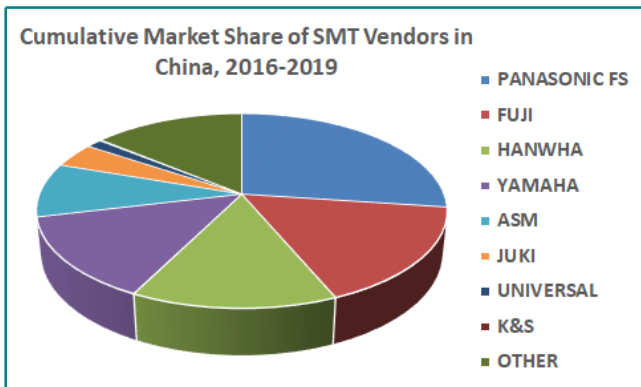
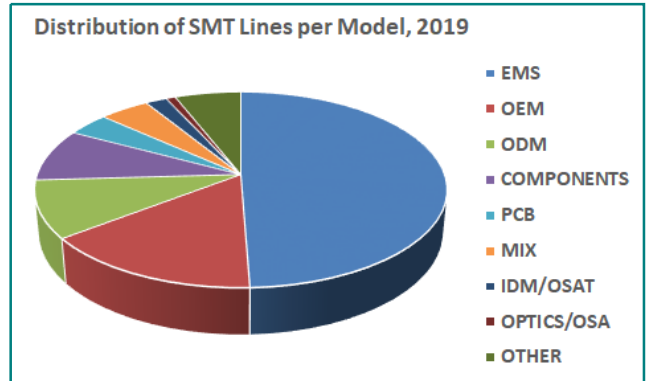
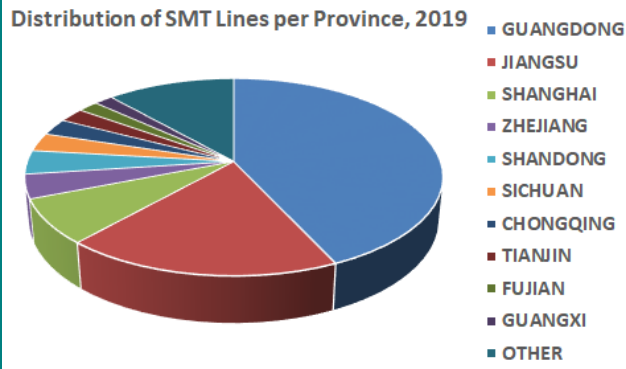


SMT Vendor - Panasonic Factory Solutions Shipments per PCBA Company, 2016-2019



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## Sample Charts (continued)



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