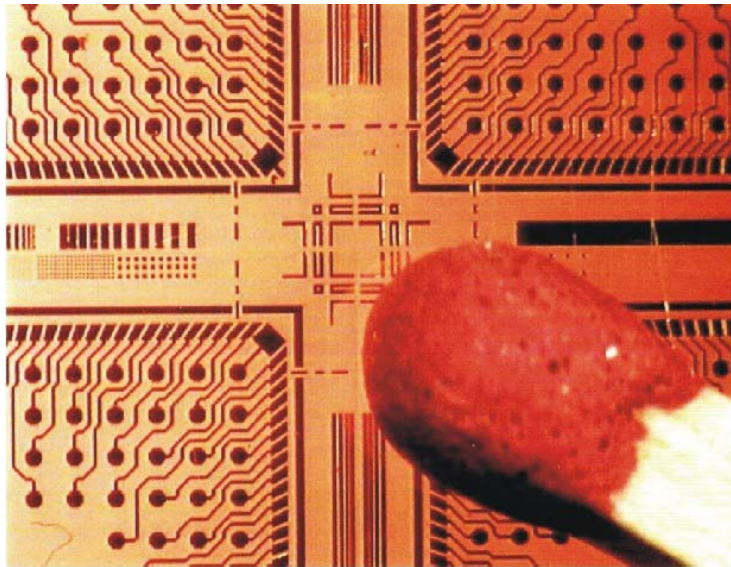




FLEXIBLE AND FLEX-RIGID SUBSTRATES

A Global Market and Technology Review 2004-2009



Laser Patterned CSP Substrate - LPKF

Key Questions Answered in This Report:

- How fast is the market for flexible and flex-rigid substrates growing?
- What are the new emerging end applications for flex and flex-rigid substrates?
- How large is the market for flex-rigid substrates and how will it develop over the next five years.
- Which new flexible and flex-rigid substrate technologies will emerge as mainstream approaches - when and why?
- What new opportunities are emerging for companies in the supply industry for new materials, process equipment and assembly services?
- Who are the players in flexible and flex-rigid substrates worldwide? How are they differentiated?
- How is flexible and flex-rigid substrate manufacturing and end market demand distributed worldwide?
- How will the trade balance of Western and Eastern production change over the next five years?
- What will be the winning strategies for successful flexible and flex-rigid substrate suppliers?
- How will EMS and ODMs impact the supply base?

Why Is This Report So Important?

This study provides a totally integrated assessment of the global flexible and flex-rigid substrate supply chain. Issues relating to technology, markets and strategic business issues have been researched in detail. A key part of this study is the identification of new emerging applications, technologies and business opportunities for all companies in the supply chain.

Flexible and flex-rigid substrates are now a key emerging technology in next generation electronic system design and development and IC packaging. Until now flex technology was seen as a specialist and niche substrate technology. The demand for increased functionality, improved signal integrity and interconnect density; is driving the requirement for flexible and flex-rigid substrates.

BPA has monitored and reported on the demand for flexible and flex-rigid substrates for over twenty years and is seen as a global authority on this market. This study presents an up to date current assessment and future forecast of how this dynamic substrate technology will evolve. The research program involved BPA in interviewing over 150 suppliers of flex and flex-rigid substrates, end users, EMS and ODM companies, materials and process equipment developers. In addition to this BPA has used its proven and reliable forecasting techniques to predict the future structure and size of this exciting sector.

<p>131 Pages 38 Tables 79 Figures</p>
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Who Should Be Interested in this Study?

The following company types will find this study essential for their strategic planning activities:

- Flexible and flex-rigid substrate manufacturers.
- PCB manufacturers.
- Semiconductor manufacturers.
- Passive component producers.
- Process equipment suppliers.
- Materials and chemical manufacturers.
- System designers/OEMs

The study has been developed for senior level managers within these companies who are involved in strategic marketing, research and development, business development and new technology introduction.

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