

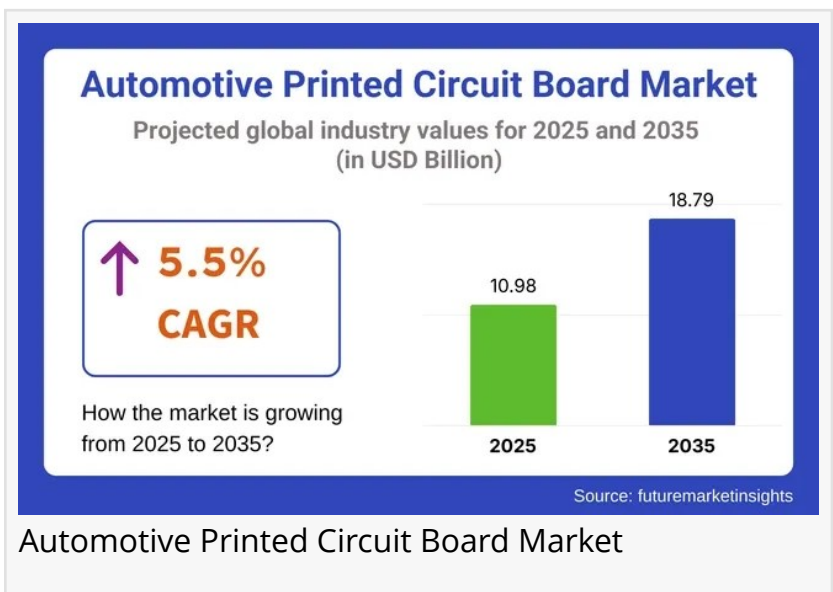
Global and European Automotive Printed Circuit Board Market Outlook 2025–2035

The automotive printed circuit board market is forecasted to grow from USD 10.98 billion in 2025 to USD 18.79 billion by 2035, exhibiting a CAGR of 5.5%.

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EINPresswire.com/ -- The global [automotive printed circuit board \(PCB\) market](#)

is entering a new phase of technological evolution, poised to expand from USD 10.98 billion in 2025 to USD 18.79 billion by 2035, registering a compound annual growth rate (CAGR) of 5.5%. The surge reflects the transformative shift toward electric mobility, advanced driver-assistance systems (ADAS), and the growing electronic sophistication of modern vehicles.



As vehicles evolve into intelligent, connected systems, PCBs are becoming the backbone of automotive innovation — enabling smarter power distribution, reliable safety mechanisms, and integrated infotainment experiences.

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Electrification, ADAS, and Connectivity Redefine PCB Requirements

The ongoing electrification of the global vehicle fleet is significantly influencing PCB architecture. Electric vehicles (EVs) demand high-density, heat-resistant, and durable circuit boards for powertrain control, inverters, and battery management systems (BMS). Multi-layer and high-density interconnect (HDI) PCBs are increasingly used to optimize space and improve energy efficiency.

Simultaneously, the proliferation of ADAS technologies — such as adaptive cruise control, blind-

spot detection, and autonomous emergency braking — is fueling demand for complex, multi-layer PCBs capable of managing radar, LiDAR, and sensor fusion applications. The integration of such technologies requires high signal integrity, lightweight designs, and enhanced thermal stability, driving PCB manufacturers to innovate with flexible and rigid-flex materials.

According to market data, multi-layer PCBs are projected to dominate with a 53.4% revenue share in 2025, underscoring their critical role in supporting modern automotive electronics. Their ability to accommodate multiple functionalities within compact designs makes them indispensable in both internal combustion and electric platforms.

Passenger Cars Continue to Lead PCB Adoption

In 2025, passenger cars are expected to capture 72.1% of total PCB demand, reflecting rising consumer expectations for connected, autonomous, and energy-efficient vehicles. With global automakers prioritizing digital cockpit experiences, real-time safety analytics, and integrated telematics, PCBs are vital for realizing next-generation mobility.

Passenger vehicle electrification in key markets such as Europe, North America, and Asia Pacific is reinforcing this trend. Governments promoting zero-emission goals are accelerating EV production, prompting automakers to source reliable PCB solutions optimized for compact form factors, high voltage endurance, and long-term reliability.

This segment's leadership is further supported by the rapid growth of semi-autonomous vehicles, which rely on high-performance PCBs for sensor management, data fusion, and environmental monitoring. As semi-autonomous features proliferate, the demand for precision circuit boards in radar and vision systems continues to surge.

Regional Leaders: China and the U.S. Set the Pace in Production and Innovation

Among leading nations, China is forecasted to register the fastest growth with a CAGR of 6.2% through 2035. The country's vertically integrated supply chain, expanding EV production, and strong domestic OEM ecosystem — including BYD and NIO — are driving demand for locally produced PCBs. China's strategic investments in solid-state batteries and vehicle digitization further strengthen its dominance in the global supply chain.

In the United States, the market is projected to grow at a CAGR of 5.8%, supported by strong EV adoption and advancements in autonomous driving technologies. Leading manufacturers such as Tesla, General Motors, and Ford are integrating high-density PCB solutions to support 5G-enabled communication, intelligent power modules, and safety-critical control systems. Partnerships between American OEMs and Asian PCB producers continue to enhance design flexibility and production scalability.

Meanwhile, Germany, recording a 5.5% CAGR, maintains its leadership in engineering precision

and sustainable vehicle electronics. German automakers, including BMW, Volkswagen, and Mercedes-Benz, are advancing PCB integration across infotainment, ADAS, and powertrain modules, leveraging Industry 4.0 automation to achieve production excellence. Similarly, Japan (4.7% CAGR) continues to innovate with compact and reliable PCB modules tailored for hybrid and electric vehicle systems, benefiting from its heritage in miniaturization and manufacturing quality.

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Key Industry Developments and Strategic Investments

Recent developments underscore the industry's focus on scaling capacity and innovation. In October 2024, Syrma SGS inaugurated a state-of-the-art manufacturing facility in Ranjangaon, India, to cater to rising global demand for automotive electronics. The facility enhances regional supply capabilities, particularly for EV and ADAS module production.

In June 2024, ECM PCB Stator Tech partnered with East West Manufacturing to advance production of next-generation PCB stator electric motors. The collaboration combines ECM's PrintStator Motor-CAD optimization platform with East West's large-scale manufacturing expertise, marking a milestone in integrating PCB technology into electric motor design. The first commercial product launch from this partnership is anticipated by the end of 2024.

These initiatives highlight the strategic realignment of global manufacturers toward vertical integration, automation, and sustainability, ensuring the supply chain keeps pace with evolving automotive electronics demand.

Market Structure and Competitive Outlook

The global automotive PCB market remains moderately consolidated, with Tier 1 suppliers such as Chin Poon Industrial, Meiko Electronics, Nippon Mektron, TTM Technologies, and Unimicron Technology dominating the competitive landscape. These players maintain leadership through technological advancements in HDI, flexible, and metal-core PCBs, coupled with strategic partnerships with automotive OEMs across North America, Europe, and Asia.

Tier 2 manufacturers, including KCE Electronics and Tripod Technology, are leveraging vertical integration and cost efficiencies to strengthen market presence. Meanwhile, specialized firms like Amitron Corp focus on niche flexible PCB solutions tailored for aftermarket and performance applications. Collectively, these companies are aligning R&D investments with trends in electrification, connectivity, and automation, ensuring robust market resilience over the next decade.

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