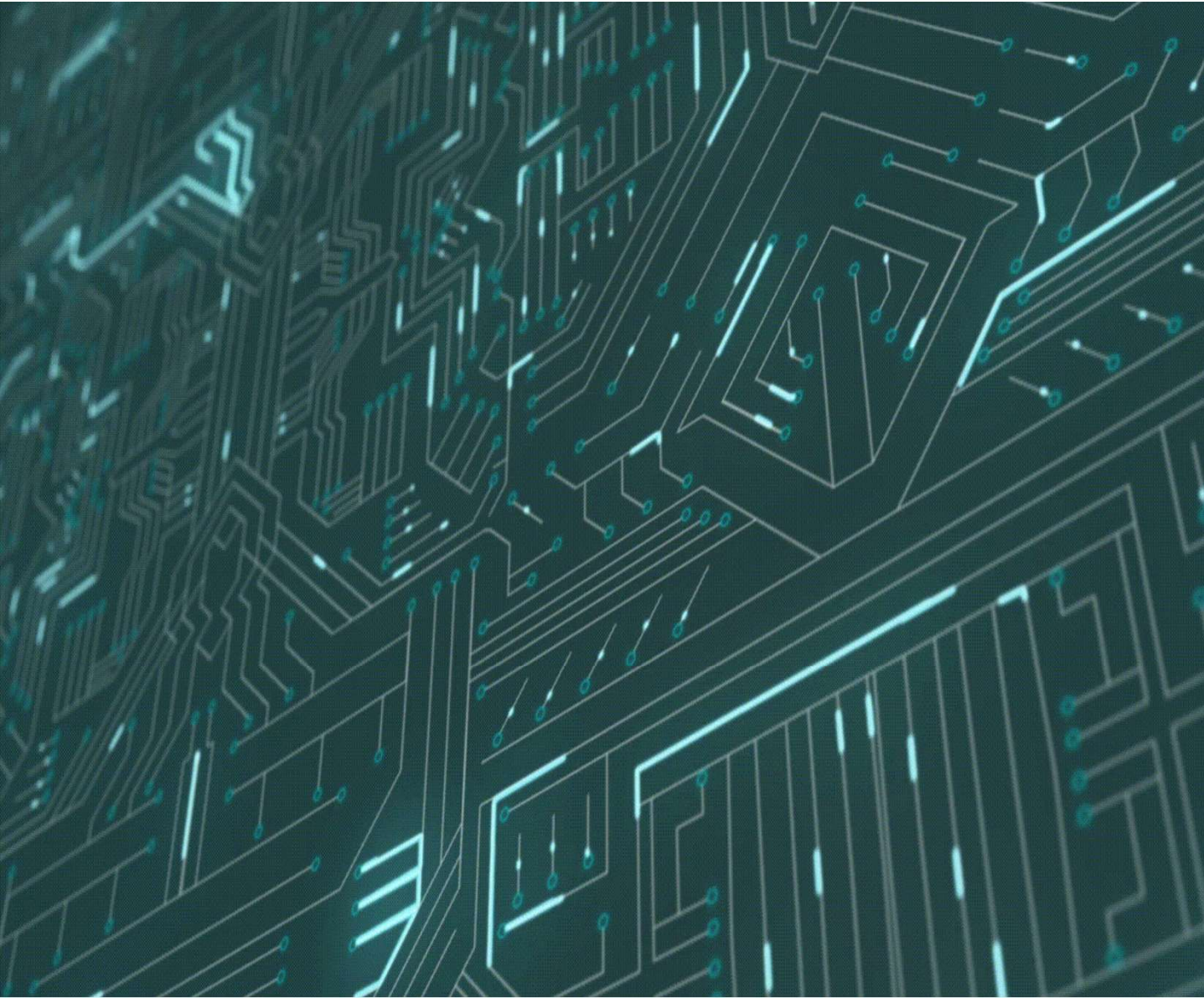


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Welcome

to the EIPC Winter Conference
Aix en Provence



February 2026



Raw material supply chain challenges 2026 for the European PCB - Industry



Rico Schlüter, February 2026





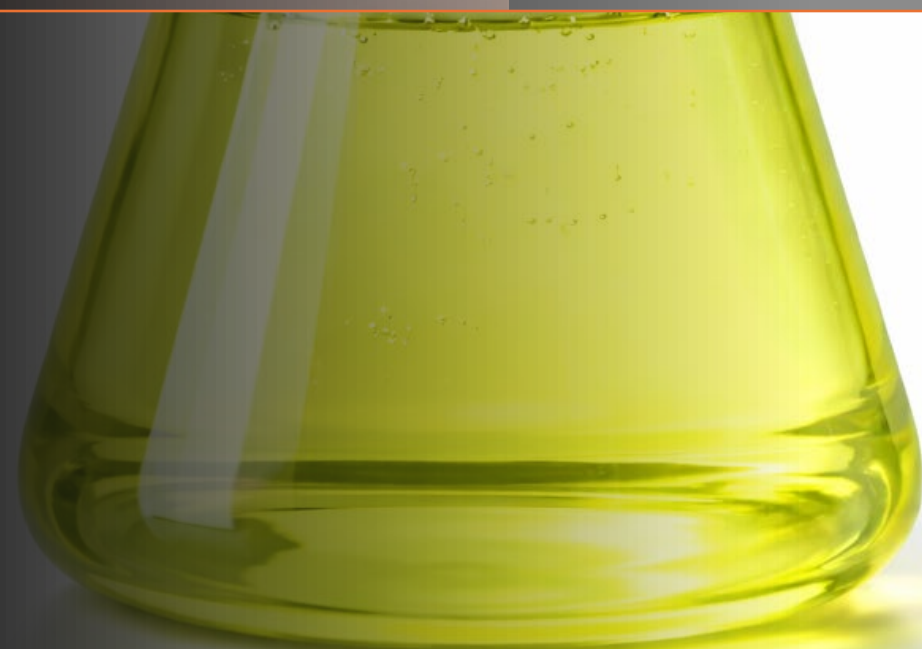
Base Materials & Prepregs





CCL & PP Key Raw Materials Trends Executive Summary

EIPC Winter Conference
Marseille Feb 2026



Copper Foil

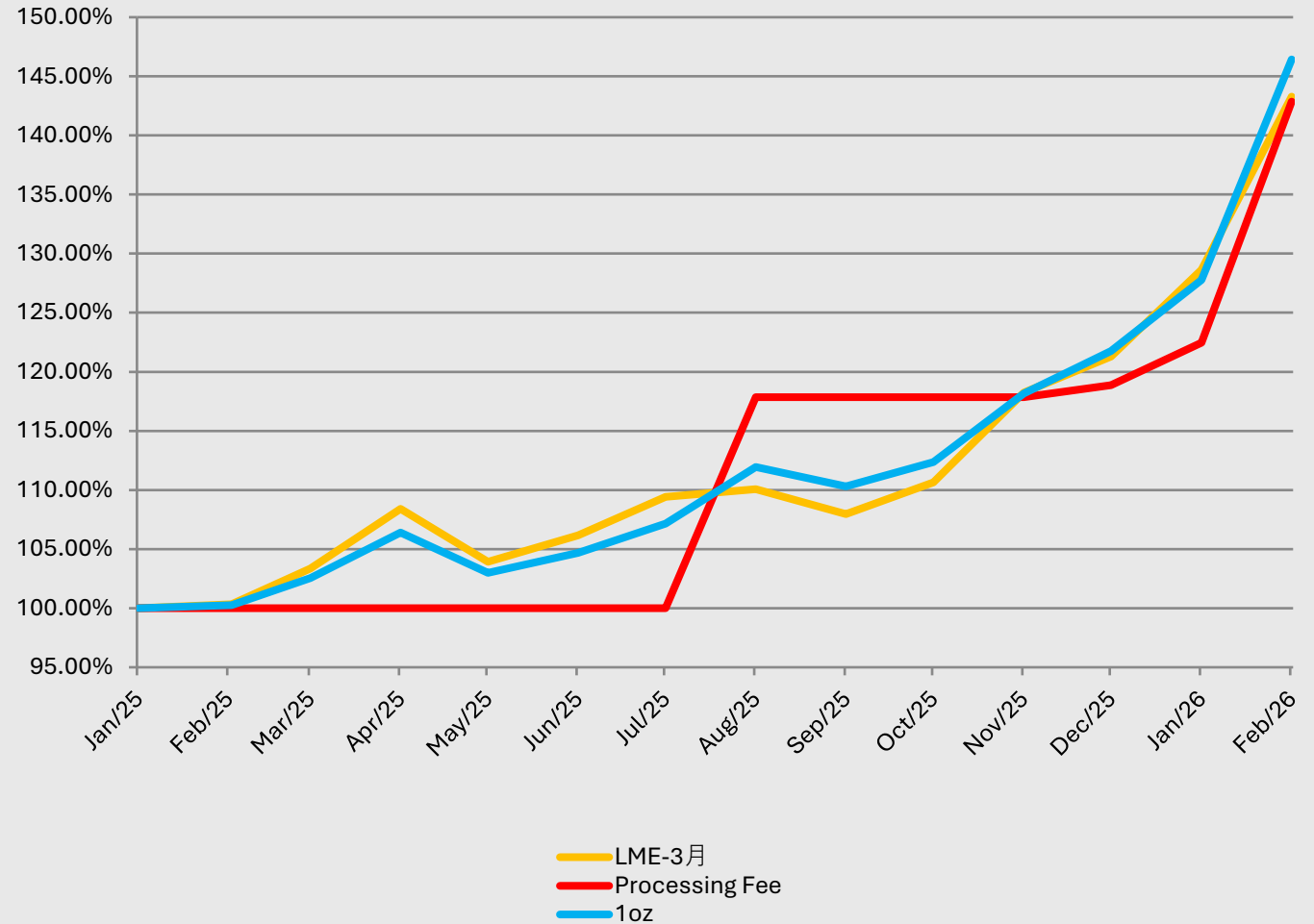
Prices structurally elevated — stronger copper metal prices, increased processing fees and robust demand from laminates, AI/5G electronics, and EV systems keep upward pressure on foil costs

High-spec foil in tight supply — ultra-thin, low-profile, and advanced performance foils face selective constraint as do standard foils from trickle down effect, as capacity shifts to next-gen laminates and segments

Major Taiwan foil producers have exited RTF foil market and HTE foil is moving to allocation as suppliers switch to HVLP1-5 foils

Supply risk remains elevated — Asia-centric production & demand, & allocation challenges.

Copper Foil



Glass Fabric

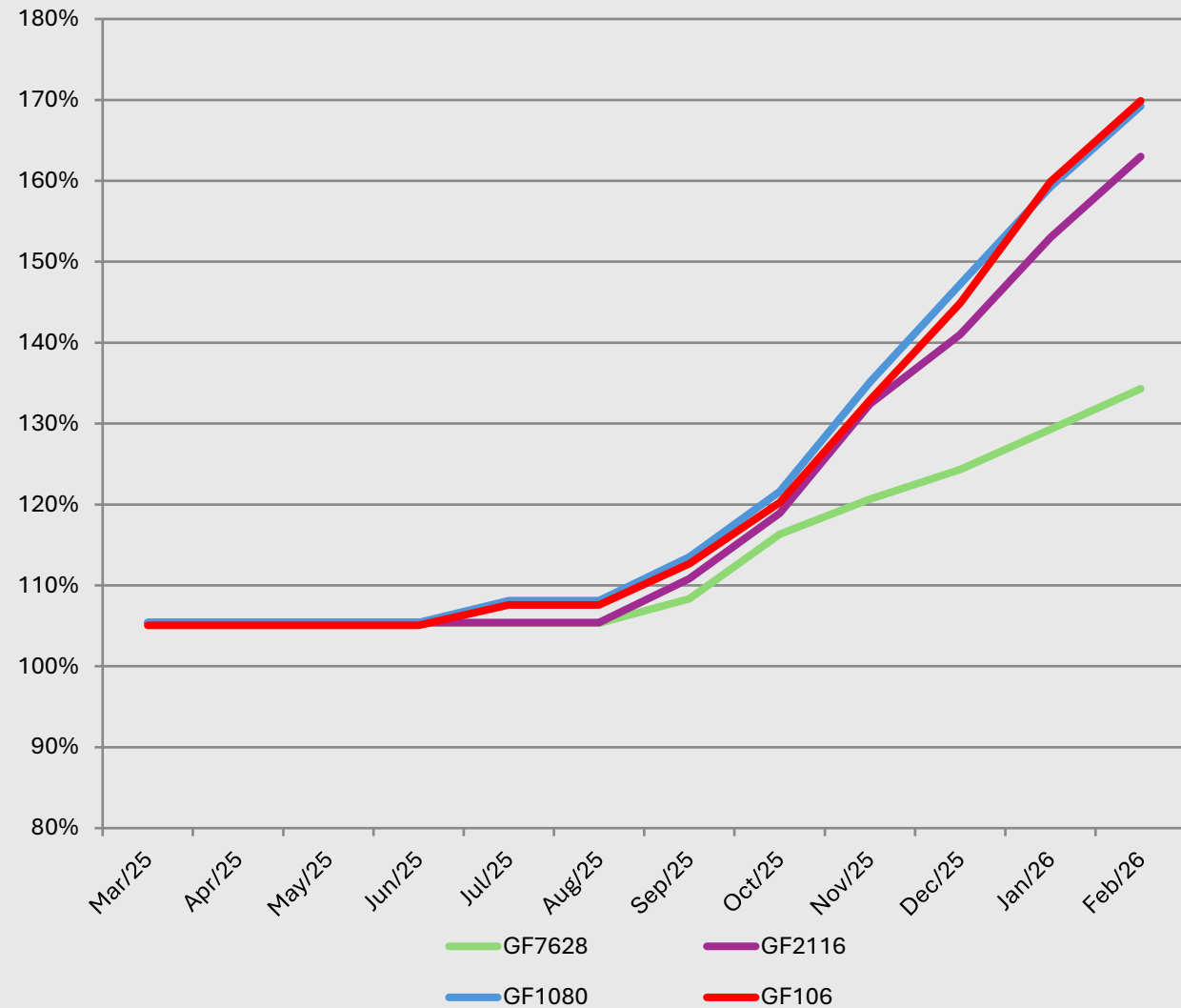
Structural supply squeeze: AI servers, advanced packaging and high-speed electronics are driving a sustained surge in demand electronic-grade glass fabric, with the tightest constraints in Low CTE and high-spec grades critical to CCL and substrates

Capacity and concentration risk: Output is controlled by a small number of qualified suppliers and cannot scale quickly due to equipment limits and long re-qualification cycles, leading to allocation, longer lead times, and inflexible order terms

Mix shift is tightening the whole market: As Japanese and Taiwanese producers prioritise high-margin, high-spec glass, availability of standard, particularly light weight glass fabrics has also tightened significantly increasing prices and reliance on China-based supply chains

Pricing trend: upward and persistent: Glass fabric cost inflation is flowing directly into prepregs, CCL, and PCB pricing, with multiple rounds of increases and material surcharges across 2026-27 rather than a one-off reset

Glass Fabric



Resins

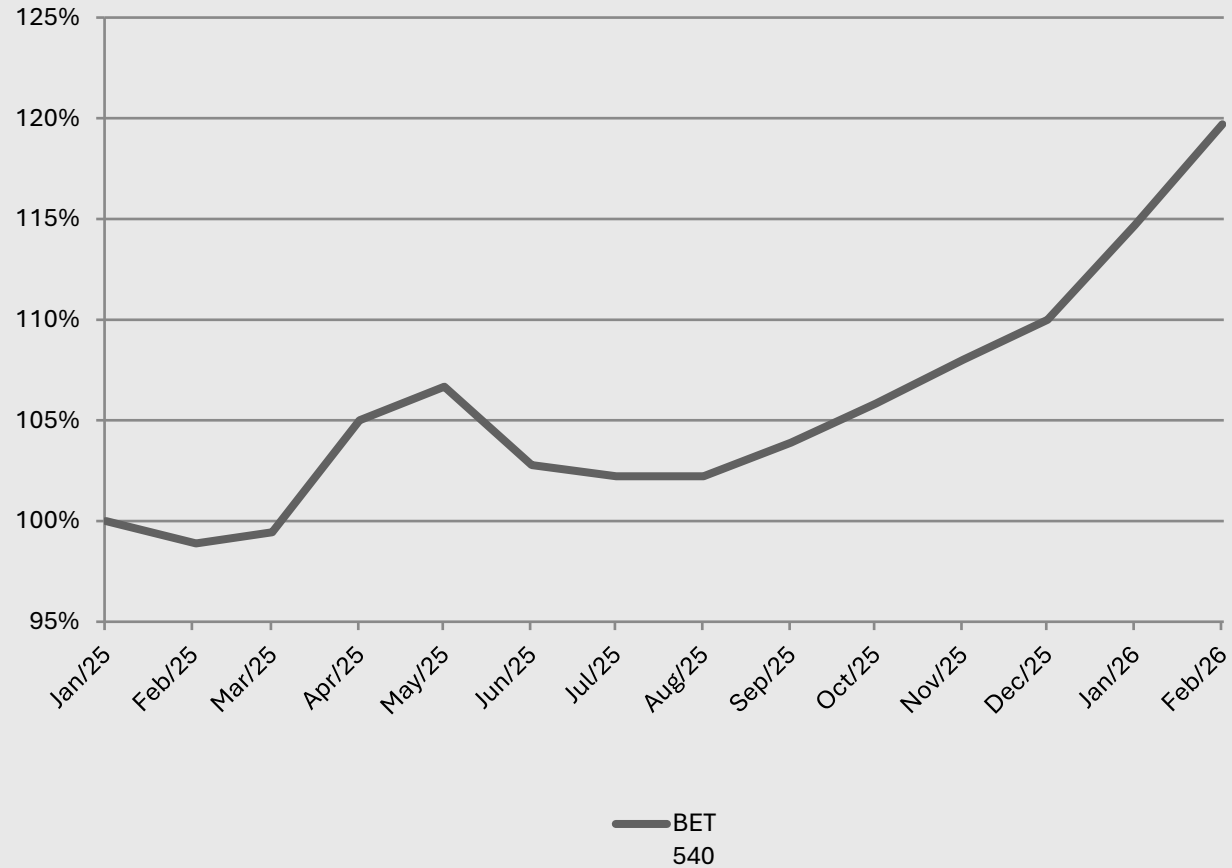
Mixed trends in 2025: Epoxy resin prices ended 2025 with modest rises accelerating into first months of 2026

Broader market growth supports base pricing: Long-term epoxy resin market value is projected to grow at mid-single-digit CAGRs into the early 2030s, underpinned by electronics, coatings, and composites demand

Low Dk/Df electronic resins are on a structurally firmer price path than standard epoxy, supported by rapid growth in AI, data-centre, high-speed networking and RF applications, limited numbers of qualified suppliers, and the technical barriers to scaling capacity — resulting in persistent premium pricing and a gradual upward cost trend rather than cyclical softness

Polyimide resins for CCL and FCCL remain a structurally tight, premium material, supported by rising demand from flexible electronics and high-temperature and high reliability applications. With few qualified suppliers and slow capacity expansion, availability is sensitive to demand swings, keeping the overall trend firm on pricing with periodic supply tightness

Epoxy Resin






Copper & Precious Metals



Significant price increases for 2026

Metals Spot Prices & Year-Over-Year Performance

Metal 	Current Price (USD/Ounce)	Day Change (%)	Year-Over-Year Change (%)
Gold	\$4,596.87	-0.28%	+72.81%
Copper	\$13,033.05 per ton (approx. \$5.80 per lb)	-1.62%	+35.01%
Palladium	\$1,794.30	-0.56%	+98.06%
Nickel	\$17,784.88 per ton (approx. \$8.07 per lb)	-1.98%	+10.84%



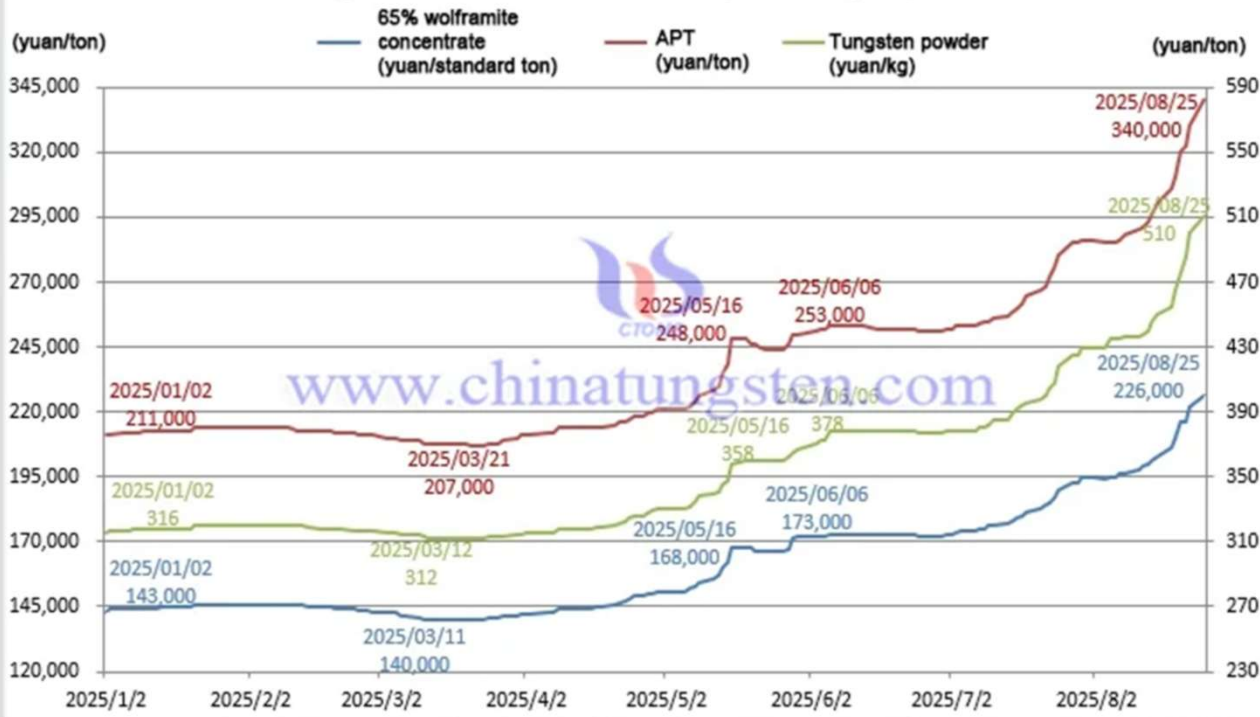


Drilling & Routing tools



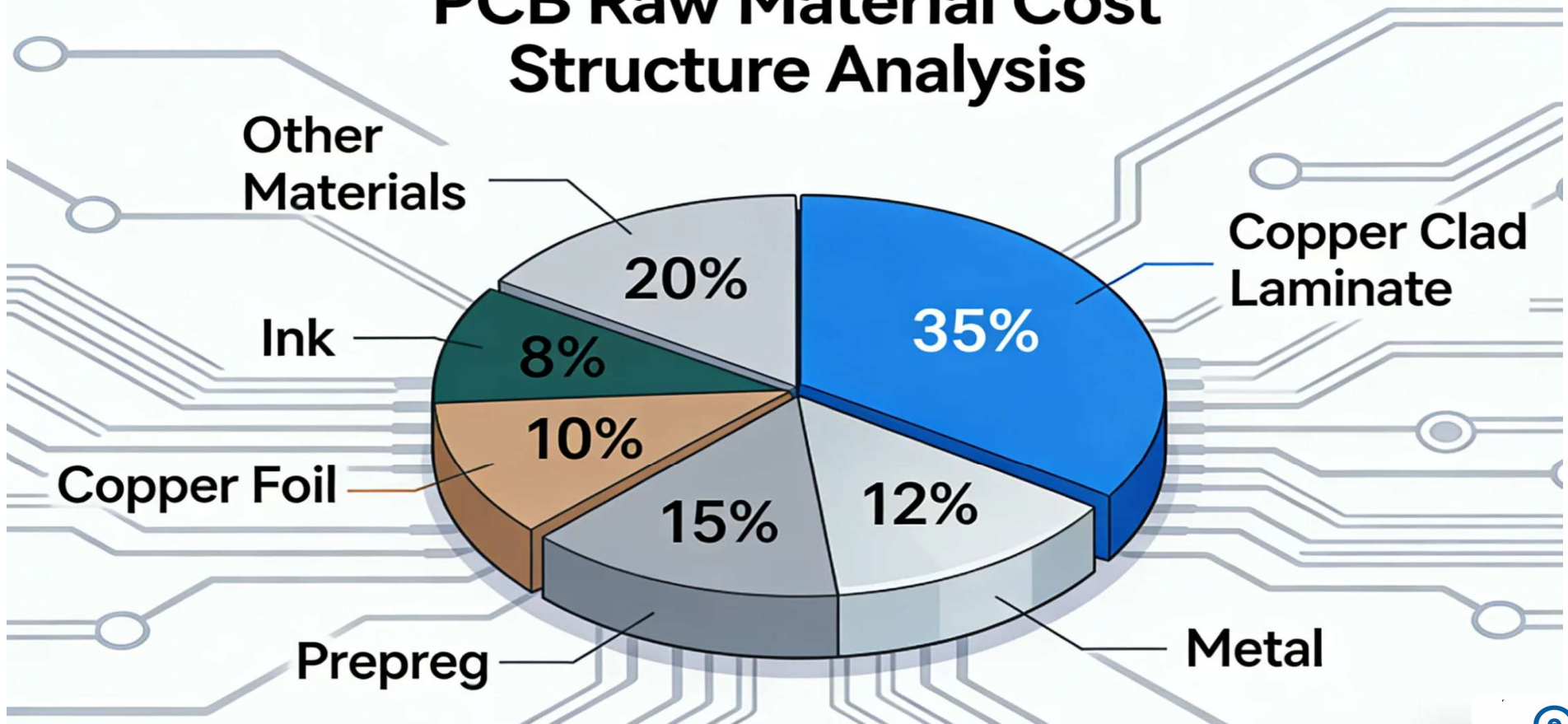
Significant price increases for 2026

Tungsten Product Price Trend, Jan-Aug 25, 2025



Significant price increases for 2026

PCB Raw Material Cost Structure Analysis





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