



WÜRTH ELEKTRONIK ASIA PRODUCTION – YOUR ACCESS TO TECHNOLOGY, VOLUME AND COMPETITIVENESS FROM ASIA

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FACTS & FIGURES

WE Asia Production

Founded	2013
Headquarter Europe	Germany
Headquarter Asia	Shenzhen
Team	85 total
Customer	>1.000 customer in >60 countries
Order Volume	> 100 Mio. USD
Service Level	96.5%
Quality Level	99.5%
Partner in Asia	13
Special	Own Warehouse in Germany, 2 own labs in Germany and China

HOW DO MANUFACTURING COSTS DEVELOP IN ASIA?

01

Production Costs

Development of
raw materials,
commodity and
labor

02

Logistics

Development
of sea and
airfreight

03

Capacity and Lead Time

Capacity in China
Outlook for
South-East-Asia
(China+1)

04

Recommendation

What to do and
how to react?

PRODUCTION COSTS

Base Material Cost

Price:

Laminate price dropped a little bit after the 2024 peak in May/June and then remained on a stable level.

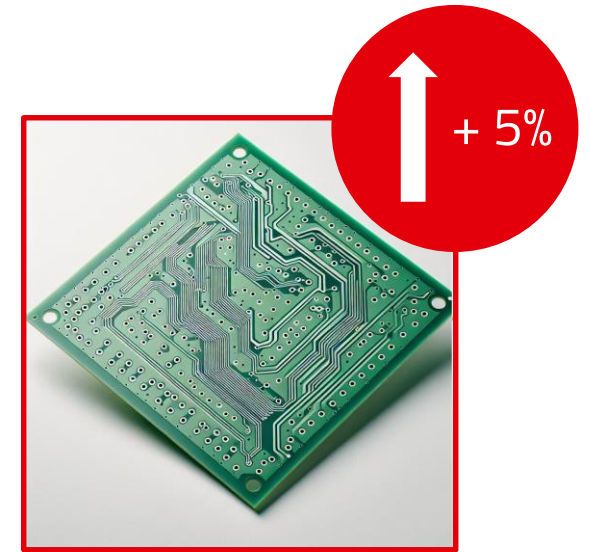
In 2025 Laminate already increased 8% and it's expected to increase further by **5-10%**. First Laminate manufacturers announced their price increase and it's only a question of time when the PCB producers will forward this price increase to the customers.

Lead Time:

The high loading of PCB plants in China, especially for AI Infrastructure, increased the demand dramatically.

Some Laminate manufacturers has extended their lead times for standard material up to **5 weeks**.

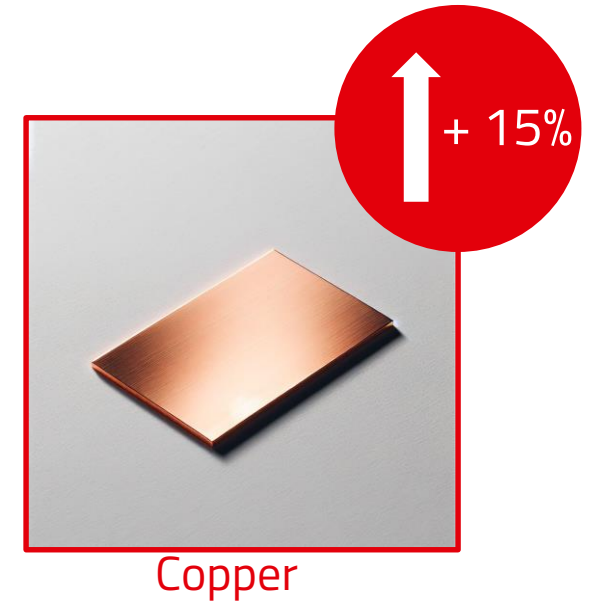
Additionally, the Laminate vendors set up purchasing quotas to the PCB manufacturers: As soon as the PCB manufacturers reach their monthly max. volume, the lead time for additional material will be increased.



Laminate

PRODUCTION COSTS

Copper Foil Cost



Similar to Laminate, copper foil reached its peak in May 2024.
The price dropped afterwards and was stable in the 2nd half of the year.
From the beginning of 2025 the copper foil price increased **15%** and costs now between 9.400 and 9.800 USD/T

It's expected that copper will reach the „record height“ of 12.000USD/T.

Source: <https://www.finanzen.net/rohstoffe>

PRODUCTION COSTS

Commodity Cost

Goldpreis Chart in Dollar - 1 Jahr

Optionen ▼ Währung: USD ▼

Intraday 1W 1M 3M 1J 3J 5J MAX



Raw Materials

Gold, silver and tin increased more than 30% since 2024 (~17% in 2025).

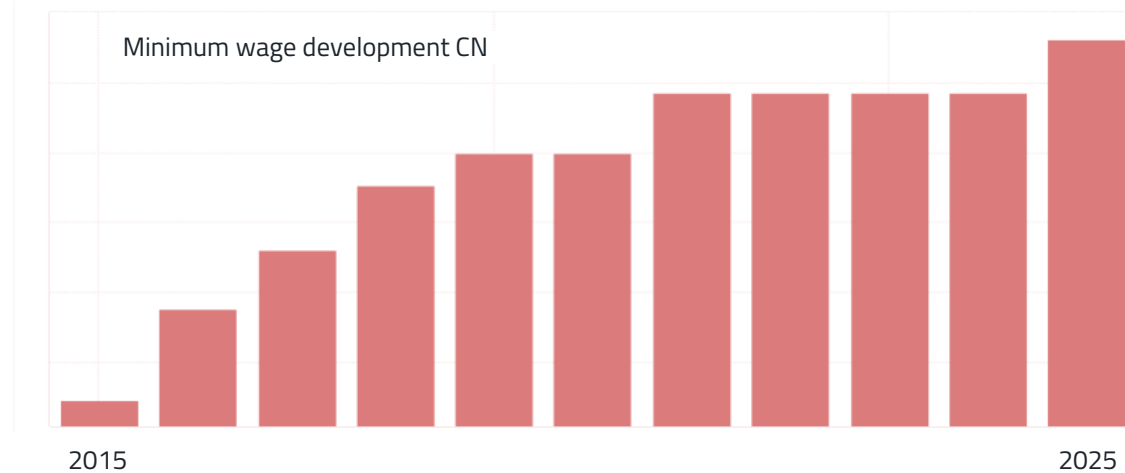
This has a direct impact on the surface treatment.

As a result, the price for the major surface finishing increases **10 - 15%**.

Source: <https://www.finanzen.net/rohstoffe>

PRODUCTION COSTS

Labor Cost



Labor Costs

Minimum wages in China increases **4%** in 2025.
Anyway, due to the high competition it's hard to find qualified workers with moderate wages/salary.
China's minimum wages are 50-90% higher than South-East-Asia's minimum wages in 2025.

Source: Ministry of Human Resources and Social Security, China

WHAT'S THE DEVELOPMENT OF SEA & AIR FREIGHT?

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LOGISTICS

Sea Freight

- Global container trade increased 7.5% in 2024 and is expected to grow ~4% on average per year from 2025 to 2028.
(add. ~6.5 mio USD annually, led by Asia Pacific)
- No signs of immediate return to the Suez canal.
Potential return of diverted Suez ships could free up to 7% of global capacity.
- Rates dropped across all trades in 2025 and are expected to be stable.



Sea Freight

Source: <https://cbonds.com/>

LOGISTICS

Air Freight

- Demand of air freight volume grows continuously. WE also transports nearly 80% of our goods by airplane
- Estimation: The planned increase of air capacity worldwide should help to keep the air cargo rates stable in Q2 – Q3/2025.



Air Freight

Source: WE

HOW ARE DELIVERY AND LEAD TIMES DEVELOPING?

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CAPACITY AND LEAD TIME

China + South East Asia

- Major PCB manufacturers in China are loaded **95 - 130%**.
- Hence, production lead times increase **20 - 40%**.
- Due to the high demand, base material lead times need
 - additional **2 - 3 weeks** for standard FR4 material (HOZ, 10Z, 20Z)
 - additional **4 - 7 weeks** for special materials (heavy copper, High CTI, High TG, etc.)
- Würth Elektronik has reserved more warehouse space to increase inventory for our customers.



Source: WE

CHINA + 1

Southeast Asia as an Option?

- Large capacities have been built up in Southeast Asia (primarily in Thailand)
- The factories are now online and in operation
- The capacity utilisation is <50%, mainly because the price is still higher than in China (= free capacity)
- Würth Elektronik has 3 approved factories (Thailand, Malaysia).
- Additionally, 2 more WE partner are opening their fabs in Q3/2025 in Thailand.



HOW CAN CUSTOMERS PREPARE BEST?

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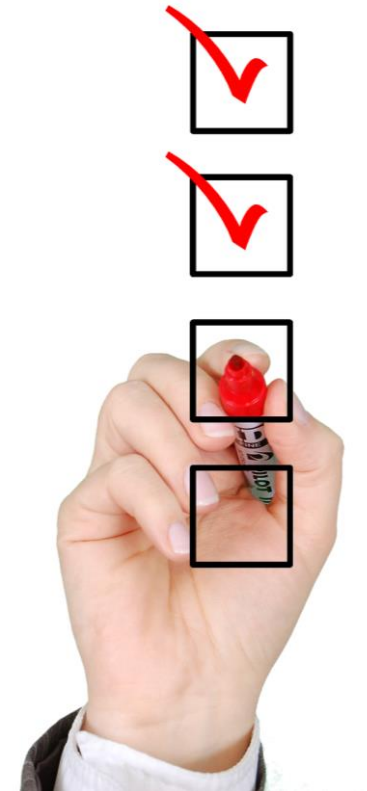
HOW CAN CUSTOMERS BEST PREPARE

At the moment, it's difficult for everybody to plan orders with an accurate forecast

We recommend you to place orders as early as possible

Please only compare current offers - even offers from a few weeks ago can vary significantly in price and/or delivery time

Würth Elektronik has reserved additional space for you in our warehouse in Niedernhall, Germany. **Increase your inventory in our warehouse: This will improve your market availability and reduce your own storage costs at the same time!** This unique service is free of charge for you!



CONTACT



We offer you a customized solution!
Contact your known sales representative or the Asia Production management team.

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