



**Global and China Aluminum Electrolytic
Capacitor Market Report, 2010-2012**

August 2011

This report

- ◆ **Analyzes Aluminum Electrolytic Capacitor market in China and worldwide**
- ◆ **Focuses on Electrode Foil Industry and main Electrode Foil manufacturers**
- ◆ **Highlights Key Aluminum Electrolytic Capacitor Manufacturers**

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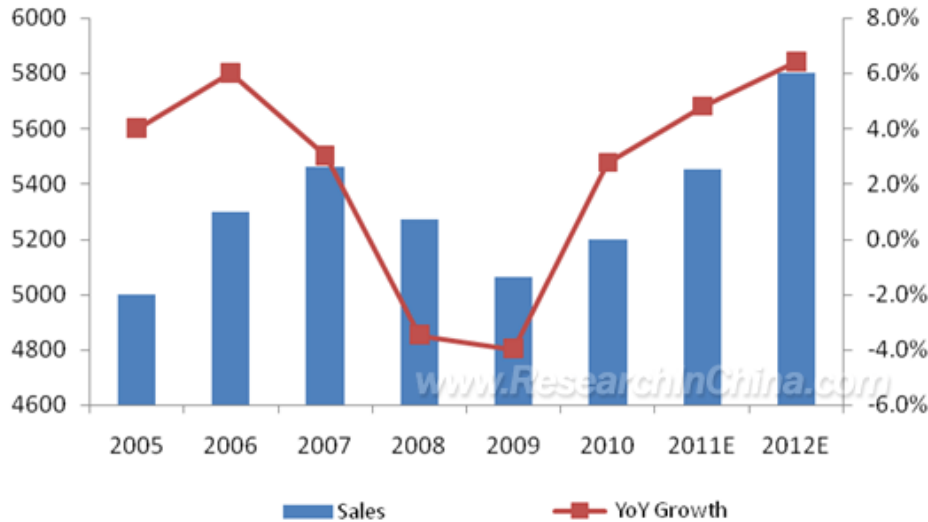
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Abstract

The global manufacturers of aluminum electrolytic capacitors are mainly distributed in Japan, Taiwan, South Korea and mainland China. In 2010, Japan-based NCC, Nichicon and Rubycon ranked top three in the global aluminum electrolytic capacitor industry.

The report not only studies the market size, competition pattern and import & export of global and China aluminum electrolytic capacitor industry, but also analyzes the operation of 15 major manufacturers around the world.

Sales and YoY Growth of Global Aluminum Electrolytic Capacitor, 2005-2012E (Unit: US\$M)



NCC is the world's largest manufacturer of aluminum electrolytic capacitors. In 2010, capacitors, mainly aluminum electrolytic capacitors, accounted for 88% of NCC's operating revenue. In addition, NCC establishes KDK which specializes in the production of electrode foil both for its own use and other aluminum electrolytic capacitor manufacturers. NCC's output of aluminum electrode foil ranks first in the world.

Nichicon is mainly engaged in the production of capacitors for consumer electronics. In fiscal year 2011, the net revenue of Nichicon registered JPY 10.59 billion, up 25% YoY. Nichicon founded production bases in Tianjin, Wuxi and Suzhou, mainly for the manufacturing of electrolytic capacitors. Moreover, Nichicon set up sales offices in Shenzhen and Shanghai, as well as an R & D center in Wuxi.

Source: China Electronic Components Association (CECA);
ResearchInChina

Lelon is an aluminum electrolytic capacitor producer with the highest operating revenue in Taiwan. In 2010, Lelon achieved operating revenue of NTD 4.33 billion, and its sales volume of aluminum electrolytic capacitors reached 148,000 in Taiwan and 5.208 million in other regions. Lelon founded several subsidiaries in mainland China which are committed to the production of electrolytic capacitors and formed foil.

Nantong Jianghai Capacitor ranks first in terms of sales revenue in the aluminum electrolytic capacitor industry in mainland China for 17 consecutive years. The company can produce 2 billion aluminum electrolytic capacitors per year, and has 20 production lines of high voltage formed foil. In 2011, Jianghai plans to expand the capacity of industrial capacitors to raise its percentage of sales revenue to 50%-60% from 42%.

Since electrode foil serves as the major raw material of aluminum electrolytic capacitor, the report also introduces the market size and competition concerning global and China electrode foil, and nine major electrode foil manufacturers as well.

Dongyangguang Aluminum has the most comprehensive aluminum deep processing industry chain in China. Besides producing electrode foil, the company also processes electrode foil materials for customers, with products mainly being exported to Japan. In H1 2011, the processing trade achieved the revenue of RMB 194 million, up 58% YoY. In 2011, the company plans to add 22 production lines of formed foil and its total capacity is estimated to reach 31.8 million square meters by the end of 2011.

The leading products of Xinjiang Joinworld are high purity aluminum, electronic aluminum foil, and electrode foil. In 2011, the capacity of Xinjiang Joinworld in high purity aluminum, electronic aluminum foil and electrode foil amounted to 33,000 tons, 20,000 tons and 4 million square meters respectively and it is expected to be expanded into 53,000 tons, 47,000 tons and 21 million square meters separately by the end of 2012.

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