



# Global and China MLCC Electronic Ceramics Industry Report, 2012-2015

Oct. 2012

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include the Ministry of Industry and Information Technology of the People's Republic of China, National Bureau of Statistics of China and China Customs etc.

## Abstract

MLCC electronic ceramics are the main raw materials for the production of MLCC. After 2009, with the gradual recovery of the global electronic industry, the demand for MLCC has rebounded, which has led to the rapid growth in the market demand for MLCC electronic ceramics. Over the same period, due to the capacity control of MLCC electronic ceramics giants in Japan and the United States, the global MLCC electronic ceramics market has maintained a balance between supply and demand. In order to maintain the monopolistic position in technology, none of major foreign MLCC electronic ceramics enterprises has set up production bases in China, and China mainly relies on imported MLCC electronic ceramics materials.

As the largest MLCC producer in the world, China has huge demand for MLCC electronic ceramics, and the demand has risen quickly with the rapid expansion of the downstream MLCC capacity in recent years. Meanwhile, due to the high technical thresholds, there are only a small number of MLCC electronic ceramics enterprises in China, and most of them have weak technological base and few high-end products.

China's MLCC electronic ceramics capacity, especially the capacity of high-end products, grows slowly, and the domestic supply gap continues to extend. The demand for MLCC electronic ceramics in China reached 24,870 tons in 2011, while the capacity was only 7,590 tons / year over the same period, meaning a supply shortfall of up to 17,280 tons. According to the capacity expansion plans of domestic enterprises, it is expected that Chinese MLCC electronic ceramics market will still be confronted with tight supply in the next 2-3 years.

**Demand for MLCC Electronic Ceramics in China, 2007-2015**  
(Unit: ton)



Source: ResearchInChina < Global and China MLCC Electronic Ceramics Industry Report, 2012-2015 >

In addition, Chinese MLCC-related products are developing in the direction of miniature and large capacity, particularly after the massive application of 01005-type MLCC in Apple iPhone, Chinese MLCC products have entered the 01005 era formally. 01005-type MLCC will replace the current popular 0201-type MLCC. The technological progress of the MLCC industry will inevitably put forward higher requirements on MLCC electronic ceramics products. In the future, the MLCC electronic ceramics products with higher purity, finer granularity and better performance will become the market mainstream, and related products will become the new hot topics for investment.

In addition to the development of the global and China MLCC electronic ceramics industry as well as China MLCC industry, the report also highlights the MLCC electronic ceramics business of 7 foreign enterprises (including Sakai, Ferro, NCI, Fuji Titanium, KCM, TODA KOGYO CORP and SFC) and 10 Chinese enterprises (including Sinocera, PDC, Xinji Chemical and Xiantao Zhongxing).

SFC is not only a world-renowned manufacturer of fine chemical products, but also a major MLCC electronic ceramics enterprise in South Korea, with high-purity barium titanate powder as its main MLCC electronic ceramics product. In 2011, the barium titanate powder business generated sales of KRW21.4 billion, down 22.5% compared with 2010.

Sinocera is the only listed company of China that specializes in the production of MLCC electronic ceramics materials, and it has been expanding the capacity greatly in recent years. In 2011, the company's capacity of MLCC electronic materials reached 1,940 tons / year, and will grow further to 2,500 tons / year in 2012.

PDC is one of the main MLCC electronic ceramics manufacturers in Taiwan. Since 2010, the company's capacity of MLCC electronic ceramics has seen rapid growth. By the end of 2011, the company's capacity of MLCC electronic ceramics had hit 2,500 tons / year. According to the plan, the company's capacity of MLCC electronic ceramics is expected to reach 3,000 tons / year in 2012.

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