



Global and China Aluminum Electrolytic Capacitor Industry Report, 2012-2015

Jan. 2013

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 Company Reports, China Customs, and National Bureau of Statistics of China etc.

Abstract

Since 2011Q4, the global aluminum electrolytic capacitor market has been heavily battered against the backdrop of faltering economies and bleak demand in the downstream consumer electronics market. Subsequently, leading industrial players including NCC, Nichicon, Panasonic, LELON and Jianghai witnessed declines in revenue.

In 2012, the global sales volume of aluminum electrolytic capacitors decreased by 7% year-on-year to 195 billion, while the sales also saw steep drop by around 18%.

Drop in Sales of Leading Aluminum Electrolytic Capacitor Enterprises Worldwide, 2012

Location	Enterprise	Drop in Sales (%)
Japan	NCC	-21.52%
	Nichicon	-1.52%
	Hitachi AIC	-17.51%
	Panasonic	-15.94%
Greater China	LELON	-9.58%
	Teapo	-21.17%
	Jianghai	-9.45%
	Tech Pro	-8.40%

Note: the revenue of Japanese enterprises refers to that in FY2012, while the revenue of enterprises in Greater China refers to that in the first three quarters of 2012.

China aluminum electrolytic capacitor industry has seen rapid development in recent years in the wake of the transfer of global aluminum electrolytic capacitor industry. Leading enterprises in Japan, South Korea and Taiwan including NCC, Nichicon, Panasonic, SAMYOUNG and LELON are accelerating their capacity expansion in China. Meanwhile, major domestic counterparts including Nantong Jianghai Capacitor Co. Ltd., Hunan Aihua Group Co., Ltd. and Shenzhen Depu Optoelectronics Technology Co., Ltd. are also in a position to compete with their foreign equivalents, with the export value witnessing increase year by year. In addition, they also have embarked on the capacity expansion of high-end products.

In terms of the import and export, the capacitor technology level of China lags far behind the world's advanced level, leading to China's failure to realize mass production of capacitors made of new materials and key capacitors applied in important fields. Thus, China is still heavily reliant on the import of high-end products, with the trade deficit remaining at a high level.

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The report highlights global and China aluminum electrolytic capacitor market size, market competition structure and import & export scale, and analyzes the leading aluminum electrolytic capacitor manufacturers the world over, the sales, capacity expansion and the expansion of new product projects of upstream electrode foil manufacturers.

NCC is currently the world's largest aluminum electrolytic capacitor enterprise, while China boasts the largest consumer market of NCC products, followed by Japan, Europe and Americas. In FY2011, the sales in the four markets stood at 43%, 28%, 8% and 8% in the total revenue, respectively. At present, NCC has established aluminum electrolytic capacitor production base in Wuxi, and set up new product R&D center in the same city to develop high-end aluminum electrolytic capacitor products.

The aluminum electrolytic capacitor capacity of LELON, one of leading aluminum electrolytic capacitor manufacturers in Taiwan, is mainly contributed by the production bases located in Huizhou of Guangdong Province and Suzhou of Jiangsu Province. The capacity of its electrode foil subsidiary LITON is mainly distributed in the production bases in Huizhou of Guangdong and Aba of Sichuan.

Nantong Jianghai Capacitor Co., Ltd. boasts one of the most important aluminum electrolytic capacitor producers in China. After listing on the Shenzhen Stock Exchange in 2010, the company input a large amount of its raised fund in the construction of aluminum electrolytic capacitor capacity and upstream electrode foil raw material capacity projects. Once realizing the full capacity in 2013, the business performance of the company is projected to see big breakthrough.

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