



China Multi-layer Ceramic Capacitor (MLCC)
Industry Report, 2013

June 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.

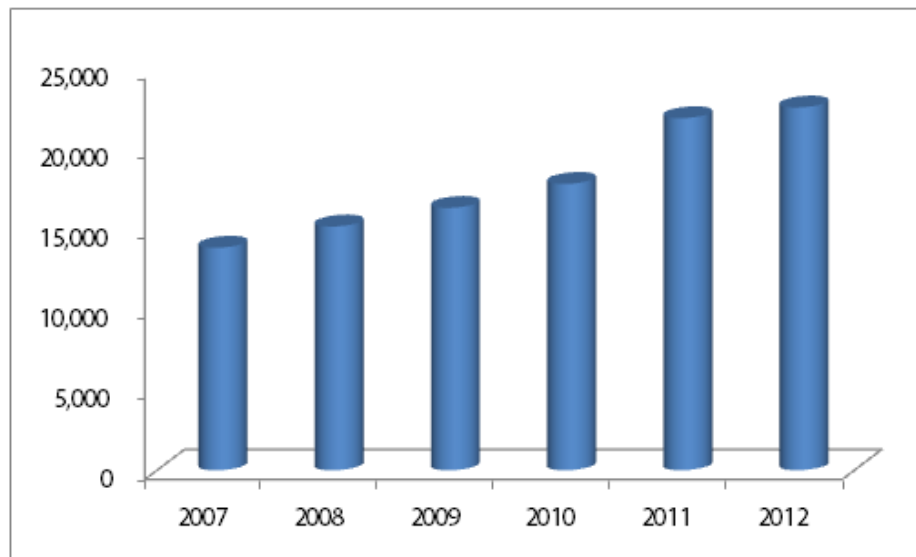
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2007-2011, China's MLCC sales revenue increased from RMB13.919 billion to RMB22.016 billion, with the CAGR of 12.1%. In 2012, impacted by economic slowdown, declined export, falling prices and other factors, the growth rate of China's MLCC sales dropped to a certain degree and remained at about 3.1%, and the sales harvested RMB22.69 billion. In the next 2-3 years, China's MLCC sales will maintain a low growth rate.

China's MLCC Sales, 2007-2012 (RMB mln)



Source: ResearchInChina China Multi-layer Ceramic Capacitor (MLCC) Industry Report, 2013

The demand for MLCC is mainly generated by mobile phones, computers, televisions and other consumer electronics. In 2012, 215.4 billion MLCCs were needed in the mobile phone field; in 2015, the demand is expected to reach 278.98 billion ones. In the computer field, 202.8 billion MLCCs were required in 2012, and 233.7 billion ones will be demanded in 2015. The demand for MLCC totaled 86 billion in 2012 and will amount to 89.51 billion in 2015.

As of 2012, there had been over ten MLCC manufacturers in Mainland China, including local enterprises Fenghua Advanced Technology, Shenzhen Eyang and Chaozhou Three-Circle; Japanese companies Murata, Kyocera and TDK; South Korean corporations Samsung Electro-Mechanics and Samwha; Taiwanese counterparts Walsin and YAGEO.

Murata and Samsung Electro-Mechanics emphasize the Chinese market more than others. Samsung Electro-Mechanics established four MLCC production bases in Dongguan, Tianjin and Suzhou to produce nearly all of types of products. Murata has set up plants in Beijing and Wuxi and its products cover a wide scope.

The report conducts the following research:

Overview of China MLCC industry, including the development history, policies and regulations, market size, import and export, status quo and future development trends;

Market size and development trends of major MLCC application fields in China (including mobile phones, computers and TV);

Profile, financial data, capacity distribution and the latest strategies of Murata, Samsung Electro-Mechanics, TDK, Kyocera, TAIYO YUDEN, Walsin, YAGEO, Samwha, Fenghua Advanced Technology, Eyang and Chaozhou Three-Circle.

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