



Global and China Aluminum Electrolytic Capacitor Market Report, 2013-2016

Jun. 2014

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

Currently, Japanese manufacturers dominate the supply of the global aluminum electrolytic capacitors, four of which rank among top five players worldwide, namely Chemi-con, Nichicon, Rubycon and Panasonic, totally enjoyed 64% of the global share in 2013, and followed by Taiwan-based companies with 14%.

In 2013, Mainland China produced about 109.5 billion aluminum electrolytic capacitors, up 9.5% year on year; it gained the sales revenue of RMB10.4 billion, representing a year-on-year increase of 9.47%. As the global aluminum electrolytic capacitor manufacturing is shifting to Mainland China, Japan, South Korea, Taiwan and Hong Kong manufacturers have set up their plants in Mainland China in recent years.

Under the context of energy saving and emission reduction era, aluminum electrolytic capacitors not only grow steadily in the field of traditional consumer electronics, but also witness extended application in many emerging fields (such as energy-saving lamps, inverters, new energy, rail transport) in the wake of restructuring and technical progress. In 2014-2016, China's demand for aluminum electrolytic capacitors is expected to grow at around 7 % and will reach 172 billion in 2016.

Given the promising aluminum electrolytic capacitor market and corporate development, Chinese aluminum electrolytic capacitor giants have been devoting themselves to R&D of new technology, capacity expansion and market share consolidation in recent years. In 2013, the top eight players represented by Man Yue Technology, Lelon Electronics, Aihua Group and Jianghai Capacitor achieved the combined capacity of more than 40.5 billion. Man Yue Technology whose capacity was 10.8 billion acted as China's largest manufacturer of aluminum electrolytic capacitors, followed by Lelon Electronics with 9.12 billion.

With the development of aluminum electrolytic capacitors and other industries, China has become the world's largest consumer of electrode foils. In 2013, Chinese aluminum electrolytic capacitors need about 37,200 tons of upstream electrode foils. As aluminum electrolytic capacitor production bases transfer to China quickly and the output ascends stably, China's electrode foil market demand is expected to hit 43,200 tons by 2016.

The report focuses on the following aspects:

- ✘ Supply, demand, market size, market structure and competition pattern of the global aluminum electrolytic capacitor market, as well as forecast for the development in the next three years;
- ✘ Supply, demand, import, export, competition pattern and market size of China aluminum electrolytic capacitor industry, and prediction for the development in the next three years;
- ✘ Global and Chinese electrode foil market size, competition, etc.;
- ✘ Operation of 9 global and Chinese electrode foil enterprises (including JCC, KDK, and Xinjiang Joinworld) and their development in China;
- ✘ Operation and aluminum electrolytic capacitor business of 13 global and Chinese aluminum electrolytic capacitor companies (including Aihua Group, Man Yue Group, Jianghai Capacitor).



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