



China Multi-layer Ceramic Capacitor (MLCC) Industry Report, 2014-2017

Aug. 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

As the world's major production base of consumer electronics, China has witnessed rapid growth in output of various products. This is particularly true of mobile phones, whose output rose from 560 million in 2008 to 1.46 billion in 2013, with a CAGR of 21.1%. Moreover, the total output of computers in different types increased from 137 million in 2008 to 352 million in 2013, at a CAGR of 20.8%. Currently, China has become the largest MLCC producer and consumer around the globe, leading the world in output and sales volume. In 2013, the output of MLCC in China reached 1.376 trillion pieces, up 10.3% from a year earlier, while the demand for MLCC came to 1.512 trillion pieces, up 13.3% on a year-on-year basis.

Judging from the structure of the demand for MLCC products, the demand from consumer electronics occupied the biggest share, attaining RMB20.39 billion in 2013, making up 67.7% of the total demand. That was followed by industrial products represented by industrial control equipment, medical electronics, and automotive electronics, whose demand amounted to RMB7.015 billion the same year, holding 23.3% market share. In addition, the accelerated electronization and informatization in military equipment also helped raise its demand for MLCC, with the market size reaching RMB1.947 billion in 2013, equaling to 6.5% of the total.



In terms of the worldwide competitive landscape, major MLCC manufacturers largely come from Japan, South Korea and Taiwan, e.g. Murata, TDK, TAIYO YUDEN and KYOCERA from Japan, Samsung Electro-Mechanics from South Korea, Yageo and Walsin from Taiwan. In 2013, Murata, the world's largest MLCC manufacturer, took up 21.5% market share; Samsung Electro-Mechanics retained its second position after surpassing TDK in 2009, hitting 20.2% market share; TDK ranked third with 12.7%.

China Multi-layer Ceramic Capacitor (MLCC) Industry Report, 2014-2017 is primarily concerned with the followings:

- Overview of MLCC Industry in China, including development history, policies and regulations, market size, production and marketing, competitive landscape, exports, trends, etc.;
- Chinese demand for MLCC by market segments, involving scale, development prospects, etc. of consumer electronics market, industrial product market, military field, etc.;
- 11 domestic and foreign manufactures e.g. Fenghua Advanced Technology, Eyang Holdings, Walsin, Samsung Electro-Mechanics, Murata, KYOCERA, TAIYO YUDEN, Yageo, TDK and Chaozhou Three-Circle, covering their profile, financial performance, output and sales volume, major customers, R&D, distribution of production base, technical features, etc.

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