



**Global and China Multi-layer Ceramic  
Capacitor (MLCC) Industry Report,  
2015-2018**

**Nov. 2015**

## 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 leading consumer electronics production base, China has seen a surge in output of various products, which has in turn driven a huge influx of MLCC capacity into the country. At present, China has been the big producer and consumer of MLCC in the world, topping the global rankings in terms of output and sales volume. In 2014, China's MLCC output reached 1.637 trillion pieces, up 19.0% from a year earlier, and the demand totaled 1.8164 trillion pieces, up 20.1% from the previous year. It is expected that in 2015 China's MLCC output and demand will come to 1.902 trillion pieces and 2.087 trillion pieces, respectively.

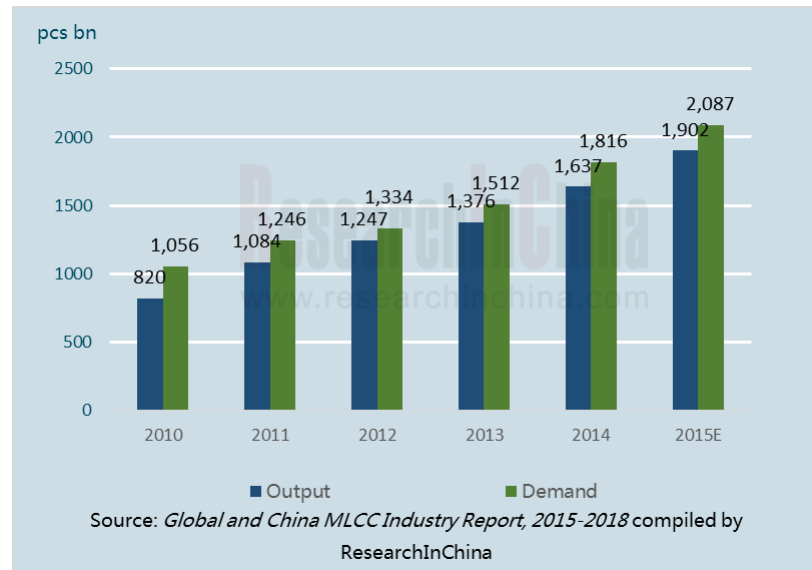
Being constantly updated, consumer electronics have become more and more powerful, which poses increasingly stringent requirement on passive components and other electronic components. In terms of the current development trends in MLCC, the capacity of unit components grows larger and larger while their volume gets smaller and smaller. The world's renowned manufacturers were competing fiercely in this respect. In 2015, Murata Manufacturing Co., Ltd. was the first to develop and mass produce the world's smallest MLCC (008004). Other key players will also shift their focus to smaller products with larger capacity. For example, Eyang Holdings' shares of 0201 MLCC will exceed that of 0402 MLCC in 2015.

As far as competition is concerned, major global MLCC manufacturers are mainly from Japan, South Korea, and Taiwan, including Japan's Murata, TDK, Taiyo Yuden, and KYOCERA, South Korea's Samsung Electro-Mechanics and SAMWHA, and Taiwan's Yageo and Walsin.

At present, Murata, the world's largest MLCC manufacturer, has a 22.8% market share in 2014. In 2015, the company invested JPY18 billion in a new MLCC factory building. Samsung Electro-Mechanics overtook TDK in 2009 as the world's second largest company, with its market share in 2014 totaling 18.0%.

In 2015, the company poured KRW288 billion into construction of an MLCC factory in the Philippines. Eyang Holdings, albeit with lower market share, devoted great efforts to working on product miniaturization. In 2015, the company's 01005/0201/0402 series miniature products accounted for over 95% of total output, and its newly launched 0201 with 1 $\mu$ F and 2.2 $\mu$ F in capacitance has reached a high level in the industry.

## China's MLCC Output and Demand, 2010-2015



Global and China Multi-layer Ceramic Capacitor (MLCC) Industry Report, 2015-2018 highlights the followings:

- Overview of China's MLCC industry, including development course, policies and regulations, market size, production and sales, competition pattern, exports, and future development trends, etc.;
- Demand from major Chinese MLCC market segments, including market size and development prospects of consumer electronics market, industrial product market, and military fields;
- MLCC upstream electronic ceramics market, including production, demand and competition pattern in the industry;
- Six foreign companies -- Murata Electronics, Samsung Electro-Mechanics, Kyocera, Taiyo Yuden, TDK, and Sanwa Electric Instrument as well as six major Chinese manufacturers -- Fenghua Advanced Technology, Eyang Holdings, Walsin, Yageo, Chaozhou Three-Circle and Torch Electron, involving profile, financial condition, output and sales volume, major customers, key products, R&D, production base distribution, and technical traits, etc.

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