

Global and China Multi-layer Ceramic Capacitor (MLCC) Industry Report, 2017-2020

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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.

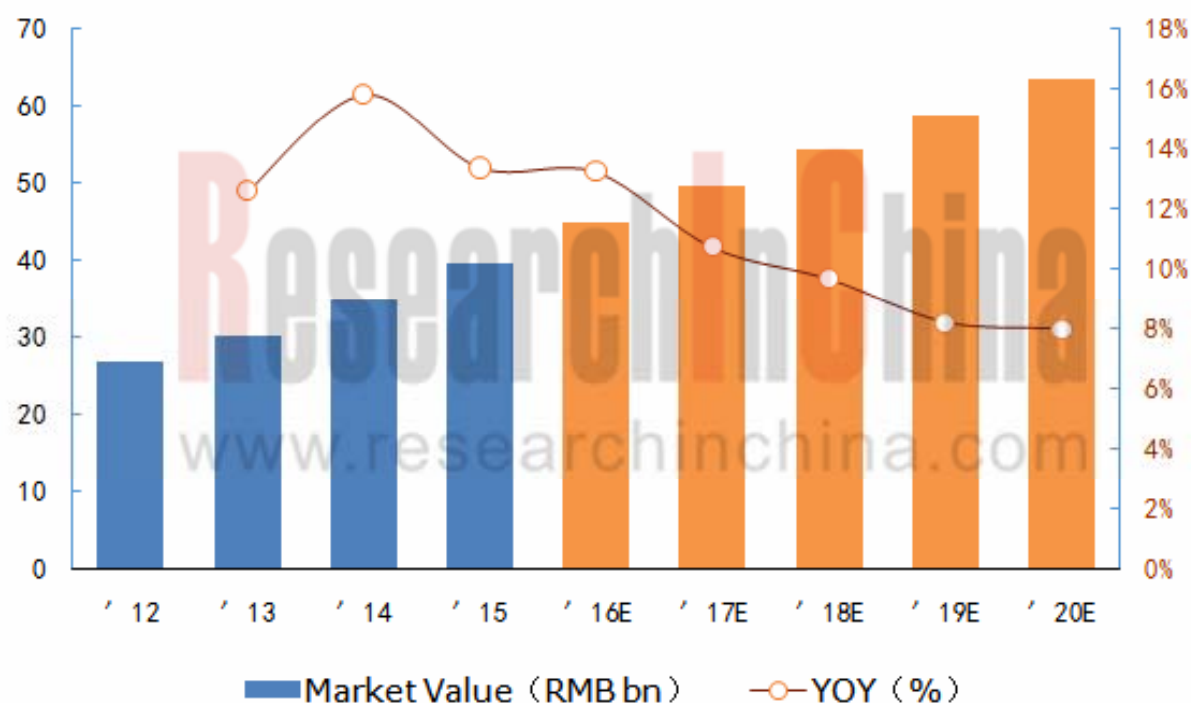
Abstract

The rapid development of consumer electronics and industrial intelligentization has greatly promoted the booming of passive components including multi-layer ceramic capacitor (MLCC). In 2015, China's MLCC market size reached RMB39.54 billion, registering a CAGR of 17.2% during 2010-2015. The figure is expected to rise 13.2% YoY to RMB44.77 billion in 2016. With the further expansion of consumer electronics, automotive electronics, industrial control equipment, modern military and other industries, the demand for MLCC will grow in the future. China's MLCC market size is expected to hit RMB63.5 billion in 2020 and register a CAGR of 9.9% during 2015-2020.

Market demand of MLCC products comes mainly from military products such as aerospace, aviation, ships, weapons and electronic countermeasure, industrial products such as system communication equipment, industrial control equipment, medical electronic equipment, automotive electronics, precision instruments, oil exploration equipment and rail transit, as well as consumer products like notebook computers, digital cameras, mobile phones, video and audio recording devices. In 2015, the market size of MLCC for consumer electronics attained RMB27.241 billion, holding a 68.9% share; followed by that for industrial products reaching RMB8.535 billion with a 21.6% share, and that for military products posting RMB2.632 billion with a 6.7% share.

In terms of product technology, MLCC as a whole moves towards miniaturization, large capacity, high frequency, high pressure and multi-core direction: in the aspect of miniaturization, Murata put 008004 ultra-miniature MLCC into mass production in 2015, Tianli Holdings also started the pre-development of the model in 2016; in point of large capacity, TDK developed new automotive MLCC with rated voltage of 1000V and characteristics of C0G and NP0 for temperature compensation in March 2016, and achieved the industry's highest electrostatic capacity range (1nF~33nF) under the rated voltage.

MLCC Market Value Forecast in China, 2012-2020



Source: Global and China MLCC Industry Report, 2016-2020 '2017/01

With respect to competitive landscape, global major MLCC vendors are mainly distributed in Japan (Murata, TDK, Taiyo Yuden and KYOCERA), South Korea (Samsung Electro-Mechanics) and Taiwan (Yageo and Walsin). Murata as the world's largest MLCC maker captured an approximately 40% share of global market in 2015, enjoying eye-catching performance in miniaturization and high capacity and targeting consumer electronics, industrial and military markets; Samsung Electro-Mechanics ranked second worldwide (surpassed TDK in 2009) and gained a 20% market share in 2015, mainly serving Samsung Electronics and targeting consumer electronics market; followed by Taiyo Yuden and TDK, with a respective market share of 13.3% and 8.2% in 2015. In spite of rapid development, Chinese companies like Fenghua Advanced Technology and Torch Electron have relatively weak foundation and poor technologies, now targeting domestic military market but still difficult to pose a threat to Japanese, Korean and Taiwanese peers in the international market.

The report highlights the following:

- Overview of MLCC industry in China, including development history, policies, laws & regulations, market size, production & sales, competition pattern, export situation, trends, etc.;
- Demand situation of major MLCC market segments in China, including market size, prospects, etc. of consumer electronics, industrial products and military areas;
- Upstream electronic ceramics market of MLCC, including the industry's production, demand and competition pattern;
- Analysis on six foreign companies (Murata, Samsung Electro-Mechanics, KYOCERA, Taiyo Yuden, TDK, and Samwha Electric) and six Chinese players (Fenghua Advanced Technology, Tianli Holdings, Walsin, Yageo, Chaozhou Three-circle, and Torch Electron), including profile, financial situation, production & sales, major customers, featured products, R&D, distribution of production bases and technical features.

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- 2.3 Capacity
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