



# Global and China Aluminum Electrolytic Capacitor Industry Report, 2018-2023

August 2018

## **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

Aluminum electrolytic capacitor, a core electronic component, is widely used in consumer electronics, computers and peripherals, industry, electric power, lighting and automobiles.

Global aluminum electrolytic capacitor production clusters in Japan, South Korea, Taiwan and Mainland China, of which Japan shares half the market. As the global aluminum electrolytic capacitor industry is transferring to China over the recent years, several Japanese companies make inroads into the Chinese market and China's output of aluminum electrolytic capacitor shoots up, reaching over 13 million units in 2017, 1.6 times the figure in 2008, and expectedly with an AAGR of at least 7% between 2018 and 2023.

Meanwhile, industries such as LED lighting, inverter home appliance, industry power supply and new energy vehicle charging have soaring demand for aluminum electrolytic capacitors in China, especially new robust demand from bitcoin miner and smartphone fast charging in 2017 when the full-year demand for aluminum electrolytic capacitor surged by 10% on the previous year.

China produces low and mid-end aluminum electrolytic capacitors in the main and still depends heavily on imported high-end products despite it has been a major production and marketing base worldwide. Compared with the previous year, China's trade deficit of aluminum electrolytic capacitor edged up to \$780 million in 2017, with import price of \$51 per unit, far above the export price.

Electrode foil is a key raw material for aluminum electrolytic capacitor, taking up 30-60% of the latter's total cost. Since 2017, the stricter national environment protection requirements have led to production suspension or bankruptcy of several aluminum foil manufacturers and further brought about tight supply of electrode foil, and Japanese companies' purchase from China because of changes in their business structure made things worse. Also, aluminum and electricity prices hike, causing a substantial rise in the prices of electrode foil in China and beyond. Weighted by high cost, aluminum electrolytic capacitor vendors like Rubycon, Nichicon, Teapo Electronic, Capxon International Electronic and Lelon Electronics have raised prices a few times since the third quarter of 2017. It is predicted that the price uptrend of aluminum electrolytic capacitor is hardly reversed in the short run.

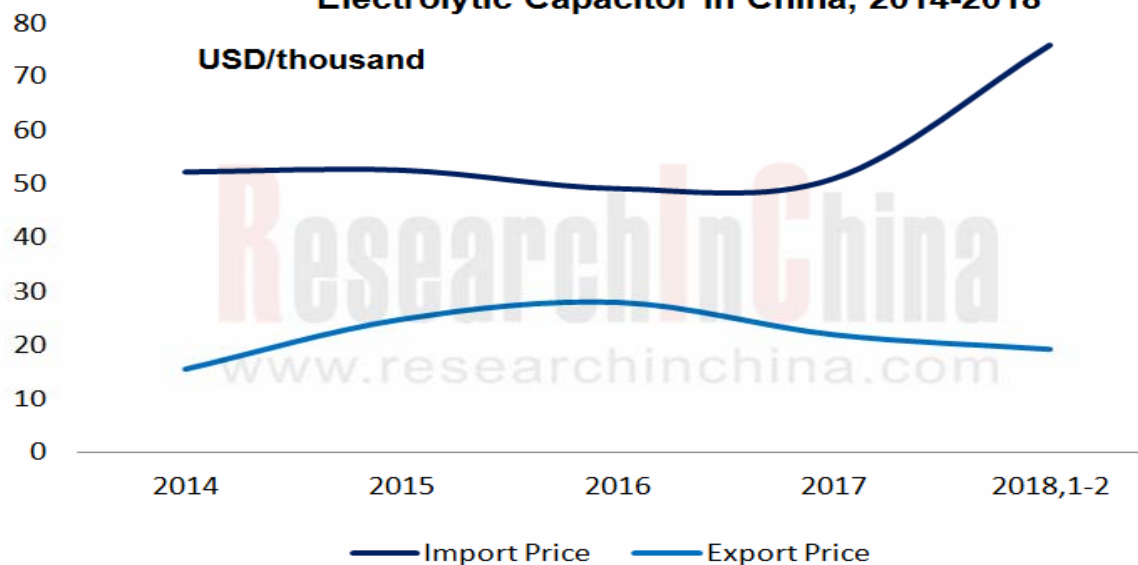
Facing cost spurt and demand change, Japanese companies have begun to pull out from the low and mid-end aluminum electrolytic capacitor markets and turned to the high value-added fields such as automobile and industry from 2017, while Chinese leaders like Aihua Group and Jianghai Capacitor not only make efforts in integrating upstream and downstream industry chains and self-supply of raw materials for cost reduction, but also foray into MLPC and other high-end areas in a bid to grab a larger market share.

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Global and China Aluminum Electrolytic Capacitor Industry Report, 2018-2023 highlights the following:

- ◆ Global aluminum electrolytic capacitor industry (supply and demand, price trend and corporate competition);
- ◆ China aluminum electrolytic capacitor industry (development environment (policy, technology and industry), supply and demand, import and export, corporate competition, price trend, etc.);
- ◆ Global and China electrode foil industry (market size, key enterprises and price trend);
- ◆ 16 global and Chinese aluminum electrolytic capacitor companies (operation, revenue structure, aluminum electrolytic capacitor business, key projects, etc.);
- ◆ 11 global and Chinese electrode foil companies (operation, revenue structure, electrode foil business, etc.).

**Average Import & Export Prices of Aluminum Electrolytic Capacitor in China, 2014-2018**



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