



**Global and China Multi-Layer Ceramic  
Capacitor (MLCC) Industry Report,  
2018-2023**

**December 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

MLCC finds most application in consumer electronics, automobile and industrial fields and gets beefed up remarkably with the approaching 5G era of cellphones and tablet PCs, the advances in automotive intelligentization, networking and electrification, and the growing popularity of Internet of Things (IoT) technologies. The Chinese MLCC market was worth RMB55.672 billion in 2017 and will be RMB99.752 billion in 2023.

As far as the demand structure is concerned, consumer electronics consume a lion's share (over 50%) of MLCC in China that is the largest producer of consumer electronics around the globe. MLCC gets increasingly utilized in consumer electronics, particularly cellphones in a bid for extended functionality and better performance. In 2017, the market size of MLCC for consumer electronics reached RMB36.173 billion and seized 64.98% shares, followed by MLCC for industrial goods (about 10%), MLCC for automotive electronics (about 10%), and MLCC for military purpose (6% or so).

The world-renowned MLCC vendors are largely from Japan, South Korea, China, and Taiwan (China), among which Japanese giants include Murata, TDK, Taiyo Yuden, Kyocera, etc.; South Korean peer refers to Samsung Electro-Mechanics; Taiwanese players cover Yageo and Walsin Technology; and Chinese counterparts are composed of Fenghua Advanced Technology, Tianli Holdings Group Limited, Chaozhou Three-circle, Fujian Torch Electron Technology, among others.

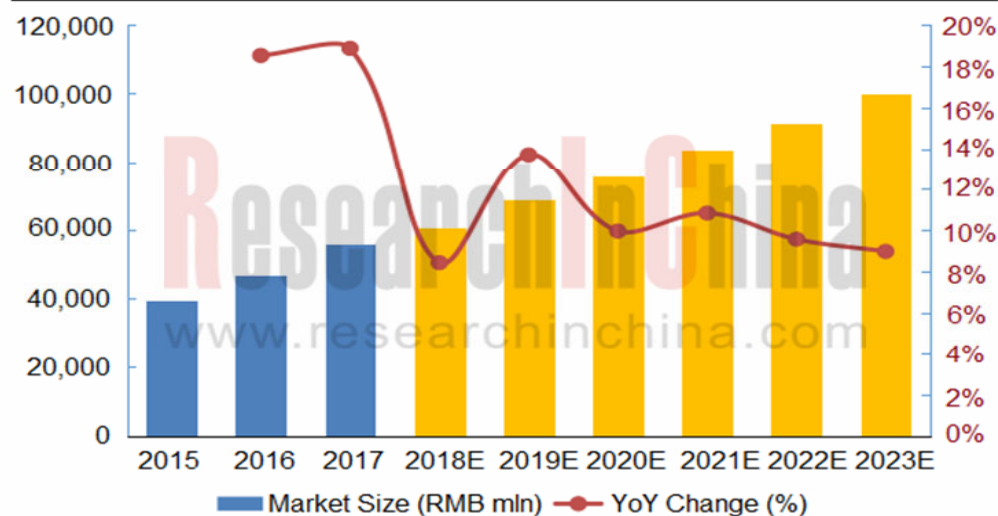
Murata is the MLCC vendor enjoying the most market shares worldwide (global share of 29% or so in 2017) and now boasts annual capacity of approximately 960 billion units. Murata lavished \$660 million for production of MLCC for medical and automotive use in 2018 and mass-production is arranged in 2019, whilst it has been slashing production of low-end MLCC and stopped shipments of such products over the recent years.

Chinese MLCC manufacturers are burgeoning in recent years but still going in for supply to consumer electronics. For more presence in the low-end product market where Japanese and South Korean giants have withdrawn, some Chinese producers are rushing to expand production successively.

The report highlights the following:

- ◆ Overview of MLCC industry (definition, classification and major policies);
- ◆ Global and China MLCC industry (market size, production, industry chain, competitive landscape, etc.);
- ◆ Demand situation of major MLCC market segments in China (automotive electronics, consumer electronics, industrial products and military areas);
- ◆ Upstream electronic ceramics market of MLCC (the industry's production, demand and competition pattern);
- ◆ Eight foreign companies (Murata, Samsung Electro-Mechanics, KYOCERA, Taiyo Yuden, TDK, KEMET, Nippon Chemi-Con and Samwha Electric) and seven Chinese players (Fenghua Advanced Technology, Tianli Holdings, Walsin, Yageo, Chaozhou Three-circle, Holy Stone and Torch Electron), including profile, financials, production & sales, major customers, featured products, R&D, production bases and technical features.

Chinese MLCC Market Size, 2015-2023E



Source: Global and China Multi-Layer Ceramic Capacitor (MLCC) Industry Report, 2018-2023

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