

Global and China Multi-Layer Ceramic Capacitor (MLCC) Industry Report, 2020-2025

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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

Electronic components like MLCC enjoy a rosy prospect alongside the burgeoning electronic manufacturing, the thriving internet and the prevalence of smart hardware.

MLCC was much sought after and its price kept rising worldwide in the first three quarters of 2018 as the global MLCC capacity structure changed and the robust demand from new applied markets of terminals grew substantially. Entering the fourth quarter of 2018, MLCC price fell a bit due to the Sino-US trade frictions, the decreasing demand for consumer electronics like smart phone, among others. As estimated, the world's MLCC market was worth \$12.8 billion in 2018, surging by 21.9% on annualized basis. In 2025, the global MLCC market size will be up to \$24 billion in pace with advances in communication standards and the popularization of new energy vehicle.

China is not only the key manufacturing base for global consumer electronics but also the world's producer and consumer of MLCCs. Spurred by strong demand from downstream industries, Chinese MLCC market is enlarging from RMB67.353 billion (up 21% YoY) in 2018 to expectedly RMB130.015 billion in 2025.

MLCC mainly finds application in such fields as consumer electronics, automotive electronics, industry/IoT/security, and military electronics. Noticeably, 64.2% of MLCCs get used in consumer electronics, accompanied by the rising share of MLCC use for new energy vehicle from 11.2% in 2018 to an estimated 19.3% in 2025 as new energy vehicle springs up.

The world-renowned MLCC vendors come mainly from Japan, South Korea and Taiwan (China) and they are divided into three echelons. The giants including Murata, Samsung Electro-Mechanics, TDK, Taiyo Yuden, and Yageo stay ahead of other peers by superiorities in ceramic powder materials and manufacturing technologies. Japanese players are in supremacy in small high-capacity and ceramic powder technologies and boast complete product matrices. The competitors from Taiwan (China), South Korea and the United States have their own edges, while the Mainland Chinese counterparts are in the third echelon.

Starting from 2017, Japanese and Korean MLCC tycoons have been pushing ahead with industrial upgrading and gearing towards small high-end capacitors with high capacity. The global under-capacity of MLCC caused MLCC price to rise ever in 2018, alluring key companies like Murata, Samsung, Yageo and Taiyo Yuden to lavish huge capital in capacity expansion successively. It is expected that global MLCC capacity will reach 6,100 billion units per year in 2025 and the tight supply will be eased then.

	Capacity(bn units)	New Capacity
Murata	1,200	<p>On June 8, 2018, Fukui Murata Manufacturing Co., Ltd., a manufacturing subsidiary of Murata Manufacturing Co., Ltd. located in Echizen, Fukui Prefecture, announced to invest JPY29 billion in constructing a new facility which is intended to increase MLCC capacity in order to respond to rising demand. It will be completed in December 2019.</p> <p>On September 25, 2018, Izumo Murata Manufacturing Co. Ltd., a manufacturing subsidiary of Murata Manufacturing Co., Ltd. located in Izumo City, Shimane Prefecture, announced to invest JPY40 billion in the construction of a new production building which is expected to be completed in November 2019.</p> <p>In November 2018, Wuxi Murata Electronics Co., Ltd., a manufacturing subsidiary of Murata Manufacturing Co., Ltd., announced to invest JPY14 billion in a new facility to increase the company's MLCC capacity. The construction is expected to be completed by December 2019.</p> <p>Murata Manufacturing Co., Ltd. planned a new production building on the grounds of the Yasu Division to raise MLCC capacity to meet higher demand over the long term. With the investment of JPY14 billion, the construction is expected to start in July 2019 and be completed in November 2020.</p>
Samsung Electro-Mechanics	840	In September 2018, Samsung Electro-Mechanics announced to invest KRW500 billion (USD443 million) in raising the capacity of its MLCC plant in Tianjin, China. The project will be put into production in 2020.
Yageo	541	In November 2018, Yageo spent NTD790 million on a plot of land in Kaohsiung Dafa Industrial Park for building a new MLCC plant, which will increase the capacity of MLCC, automotive and high-end components. NTD10 billion will be invested by phases before 2020. According to Yageo's capacity planning, the monthly MLCC capacity will reach 60 billion units in 2019 and 70 billion units in 2020.
Taiyo Yuden	540	<p>The MLCC plant (the third plant) invested by Taiyo Yuden with JPY10 billion was completed in December 2018, and became operational in March 2019. The capacity will be lifted by 60% than before.</p> <p>On January 28, 2019, Taiyo Yuden invested approximately JPY15 billion in its production subsidiary Niigata Taiyo Yuden Co., Ltd., where Building No. 4 (scheduled for completion in April 2020) will expand capacity.</p>
KYOCERA	240	In 2018, Kyocera planned to build a new MLCC production line at its branch in Kagoshima Prefecture, Japan. The new plant is scheduled to be completed in 2021, and the estimated construction cost will be about JPY6 billion (USD53 million).
Fenghua Advanced Technology	144	An MLCC technological transformation and capacity expansion project with new monthly addition of 5.6 billion units
Torch Electron	5	On September 6, 2019, Torch Electron planned to raise no more than RMB600 million, of which about RMB447 million will be spent on a high-tech industrialization project of small-capacity thin-media MLCC. The construction will last two years. Upon the completion, the new capacity will be 8.4 billion units.

Global and China Multi-layer Ceramic Capacitor (MLCC) Industry Report, 2019-2025 highlights the following:

- MLCC market (size, production & sales, demand, capacity and competitive pattern);
- MLCC market segments (military, industrial, consumer electronics, automotive electronics);
- Upstream sectors;
- 8 foreign and 7 Chinese MLCC companies (operation, products, etc.).

1. Overview of MLCC Industry

- 1.1 Product Definition
- 1.2 Main Classification of Ceramic Capacitor
- 1.3 Trends of MLCC Products
- 1.4 Industry Supervision and Laws & Regulations
- 1.5 Industry Policy

2. MLCC Market Size

- 2.1 Overall Market Size
- 2.2 Production & Sales
- 2.3 Capacity
- 2.4 Competitive Landscape

3. Market Segments

- 3.1 Military
- 3.2 Industrial Products
- 3.3 Consumer Electronics Market
- 3.4 Automotive Electronics Market

4. Upstream Materials Market


- 4.1 Introduction to MLCC Ceramic Materials
- 4.2 Supply
- 4.3 Demand
- 4.4 Competitive Landscape

5. Major Foreign MLCC Vendors

- 5.1 Murata
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Main Business
 - 5.1.4 Orders
 - 5.1.5 Main Products
 - 5.1.6 Wuxi Murata Electronics Co., Ltd
 - 5.1.7 Beijing Murata Electronics Co., Ltd.
 - 5.1.8 Capacity Expansion Plan
 - 5.1.9 Latest Advances
- 5.2 Samsung Electro-Mechanics
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Product Structure
 - 5.2.4 Regional Structure
 - 5.2.5 Main Products
 - 5.2.6 Dongguan Samsung Electro-Mechanics Co., Ltd. (DSEM)
 - 5.2.7 Tianjin Samsung Electro-Mechanics Co., Ltd. (TSEM)
 - 5.2.8 Samsung Electro-Mechanics Co., Binhai Branch Factory
 - 5.2.9 Samsung Electro-Mechanics Co., Suzhou Branch Factory
 - 5.2.10 Capacity Expansion Plan
- 5.3 TDK
 - 5.3.1 Profile
 - 5.3.2 Operation

- 5.3.3 Main Business
- 5.3.4 Product
- 5.3.5 R&D
- 5.3.6 Latest Advances
- 5.3.7 Production Bases in China
- 5.3.8 TDK Xiamen Co., Ltd.
- 5.4 KYOCERA
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Main Business
 - 5.4.4 Main Products
 - 5.4.5 R&D
 - 5.4.6 Shanghai KYOCERA Electronics Co., Ltd.
 - 5.4.7 Latest Advances
- 5.5 Taiyo Yuden
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Main Business
 - 5.5.4 R&D expenses
 - 5.5.5 Main Products
 - 5.5.6 Strategy for MLCC Development
 - 5.5.7 Dongguan Taiyo Yuden Co., Ltd.
 - 5.5.8 Latest Advances
- 5.6 KEMET
 - 5.6.1 Profile

- 5.6.2 Operation
- 5.6.3 Main Business
- 5.6.4 Main Products
- 5.7 Samwha Electric
 - 5.7.1 Profile
 - 5.7.2 Main Products
 - 5.7.3 Tianjin Samwha Electric Co., Ltd.
- 5.8 Nippon Chemi-Con
 - 5.8.1 Profile
 - 5.8.2 Operation
 - 5.8.3 Main Business
 - 5.8.4 Main Products
- 6. Major Chinese MLCC Manufacturers**
 - 6.1 Fenghua Advanced Technology
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Main Business
 - 6.1.4 Gross Margin
 - 6.1.5 Production, Sales, and Capacity of Main Products
 - 6.1.6 Customers & Suppliers
 - 6.1.7 R&D
 - 6.1.8 Guanhua Chip Type Ceramic Capacitor Branch
 - 6.2 Tianli Holdings Group Limited
 - 6.2.1 Profile



6.2.2 Operation	6.5.5 Production & Sales
6.2.3 Main Business	6.5.6 Major Customers and Channels
6.2.4 Gross Margin	6.5.7 Development Strategy
6.2.5 Main Products	6.5.8 Dongguan Walsin Technology Electronics Co., Ltd.
6.2.6 R&D	6.6 Yageo
6.3 Chaozhou Three-circle	6.6.1 Profile
6.3.1 Profile	6.6.2 Operation
6.3.2 Operation	6.6.3 Main Business
6.3.3 Main Business	6.6.4 Main Products
6.3.4 Main Products	6.6.5 Production & Sales
6.3.5 R&D	6.6.6 Production Layout
6.4 Torch Electron	6.6.7 Yageo Electronics (China) Co., Ltd.
6.4.1 Profile	6.7 Holy Stone
6.4.2 Operation	6.7.1 Profile
6.4.3 Main Business	6.7.2 Operation
6.4.4 Gross Margin	6.7.3 Main Business
6.4.5 R&D	6.7.4 Main Products
6.4.6 Main Products	6.7.5 Production & Sales
6.4.7 Production Lines and Capacity	6.7.6 Global Layout
6.5 Walsin Technology	
6.5.1 Profile	
6.5.2 Operation	
6.5.3 Main Business	
6.5.4 Main Products	

Main Production Processes and Technologies of MLCC

MLCC Industry Chain

Mainstream MLCC Size, 1996-2020

Market Size of Global MLCC Industry, 2013-2025E

Market Size of China MLCC Industry, 2013-2025E

Market Size of China MLCC Industry (by Application), 2018&2025E

China's MLCC Output and Sales, 2016-2025E

China's MLCC Demand, 2016-2025E

Global MLCC Manufacturers Distribution, 2018

Global MLCC Capacity Distribution, 2018

Global MLCC Capacity, 2012-2025E

Growth Rate of Global MLCC Market (by Region), 2019-2024E

Market Share of Global Major MLCC Manufacturers, 2018

Main Applications of Military MLCC

China's Defense Budget Growth Rate, 2011-2019

China's Military MLCC Market Size, 2016-2025E

Comparison of Gross Margin (by Business Model) between Military and Civil MLCC Companies in China

China's Industrial MLCC Market Size, 2016-2025E

Number of MLCC Used in Each Generation of iPhones

Number of MLCC Used in Phones with Different Communication Standards

China's Consumer Electronics MLCC Market Size, 2016-2025E

Global Demand from New Energy Vehicle for MLCCs, 2018-2025E

China's Automotive Electronics MLCC Market Size, 2016-2025E

Global MLCC Electronic Ceramics Output, 2017-2025E

Global Demand for MLCC Electronic Ceramics, 2017-2025E

Market Share of Global Major MLCC Electronic Ceramics Manufacturers, 2019

Revenue and Net Income of Murata, FY2012-FY2019

Revenue and Net Income of Samsung Electro-Mechanics, 2011-2019

Revenue and Net Income of DSEM, 2011-2018

Revenue and Net Income of TSEM, 2011-2018

Five Core Technologies and 15 Key Businesses of TDK

Revenue and Net Income of TDK, FY2013-FY2020

Automotive MLCCs of TDK

R&D Expenses to Net Sales Ratio, FY2014-FY2019

Revenue and Net Income of Kyocera, FY2013-FY2020

R&D Expenditure of Kyocera, FY2014-FY2019

Revenue and Net Income of Taiyo Yuden, FY2013-FY2020

Revenue Structure (by Application) of Taiyo Yuden, FY2015-FY2019

R&D Expenditure of Taiyo Yuden, FY2015-FY2019

MLCC Development Course of Taiyo Yuden

Main MLCC Products of Taiyo Yuden

TAIYO YUDEN's MLCC Strengths in Automobile Market

MLCC Development Strategy Map of Taiyo Yuden

MLCC Production Bases of Taiyo Yuden

Revenue and Net Income of KEMET, FY2013-FY2020


Revenue of KEMET by Product& Region, 1HFY2020

Parameters of Samwha Electric's MLCCs


Revenue and Net Income of Nippon Chemi-kon, FY2014-FY2019

Revenue of Nippon Chemi-kon by Product, FY2016-FY2019

Revenue and Net Income of Fenghua Advanced Technology, 2012-2019



Revenue of Fenghua Advanced Technology (by Region), 2012-2019
R&D Costs and % of Total Revenue of Fenghua Advanced Technology, 2012-2019
Progress of Big Non-equity Investment Projects of Fenghua Advanced Technology, H1 2019
Revenue and Net Income of Tianli Holdings, 2012-2019
MLCC Gross Margin of Tianli Holdings, 2011-2019
R&D Costs and % of Total Revenue of Tianli Holdings, 2012-2019
Revenue and Net Income of Chaozhou Three-circle, 2011-2019
Main MLCC Products of Chaozhou Three-circle
R&D Costs and % of Total Revenue of Chaozhou Three-circle, 2011-2019
Revenue and Net Income of Torch Electron, 2011-2019
R&D Costs and % of Total Revenue of Torch Electron, 2013-2019
New Products of Torch Electron
Own Business, Proxy Business and Corresponding Customers of Torch Electron
Revenue and Net Income of Walsin Technology, 2012-2019
Main MLCC Series of Walsin
Main Customer Categories and % of Total Revenue of Walsin, 2018
Main Channels and % of Total Revenue of Walsin, 2018
Revenue and Net Income of Yageo, 2012-2019
Product Category of Yageo
MLCC Factory Overview of Yageo, 2019
Revenue and Net Income of Holy Stone, 2013-2019
Global Layout of Holy Stone, 2018
Advantages and Applications of Main Capacitor Products
Main Classification of Capacitors
China's Policies on MLCC and Related Material Industries



MLCC Capacity Expansion Plan of Major Manufacturers, 2019
MLCC Production Distribution of Foreign Manufacturers in China
MLCC Maker Production Capacity, 2018
Number of MLCC Demanded in Different Vehicle Models and Sub-systems
Classification and Application of MLCC Electronic Ceramics Materials
Basic Information of Murata
Revenue of Murata (by Product), FY2016-FY2019
Revenue of Murata (by Region), FY2015-FY2019
Revenue of Murata (by Application), FY2015-FY2019
Main Product Orders of Murata, FY2017-FY2019
Main MLCC Product Series of Murata
Basic Information of Wuxi Murata Electronics
Basic Information of Beijing Murata Electronics
New Factory Construction Plan of Wuxi Murata Electronics
Specification of NFM18HC series
Revenue and Profit Structure (by Product) of Samsung Electro-Mechanics, 2016-2019
Regional Distribution of Samsung Electro-Mechanics' Major Products and Customers
Revenue and Profit Structure (by Region) of Samsung Electro-Mechanics, 2016-2018
MLCC Product Series of Samsung Electro-Mechanics
Basic Information of TDK
Revenue of TDK (by Product), FY2018-FY2020
Revenue of TDK (by Region), FY2014-FY2020
Main Passive Components Product of TDK
Technical Parameters of MEGACAP Type with Metal Terminal
Main Passive Components Production Bases of TDK in China



Basic Information of TDK Xiamen
Main MLCC Products of TDK Xiamen
Basic Information of Kyocera
Key Segment and Product of Kyocera
Revenue of Kyocera (by Product), FY2015-FY2020
Revenue of Kyocera (by Region), FY2015-FY2019
MLCC Product Series of Kyocera
Basic Information of Shanghai Kyocera Electronics
Parameter Indicators of Kyocera's 0201 / 01005 MLCC
Basic Information of Taiyo Yuden
Revenue of Taiyo Yuden (by Product), FY2015-FY2020
Revenue of Taiyo Yuden (by Region), FY2015-FY2019
Basic Information of Taiyo Yuden (Guangdong)
Main Parameter Indicators of PMK432 BJ108MU-TE
Revenue of KEMET by Product, FY2017-FY2019
Revenue of KEMET by Region, FY2017-FY2019
Major MLCC Products of KEMET
Main MLCC Products of Samwha Electric
Basic Information of Tianjin Samwha Electric
Revenue of Nippon Chemi-kon by Product, FY2016-FY2018
Revenue of Nippon Chemi-kon by Region, FY2017-FY 2018
MLCC Product Series of Nippon Chemi-kon
Revenue of Fenghua Advanced Technology (by Product), 2017-2019
Gross Margin of Fenghua Advanced Technology (by Product), 2016-2019
Output, Sales Volume, and Inventory of Fenghua Advanced Technology (by Product), 2016-2018



Fenghua Advanced Technology's Sales from Top 5 Customers and % of Total Sales, 2017-2018
Fenghua Advanced Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2017-2018
MLCC Technology Transformation & Production Expansion Project of Fenghua Advanced Technology
Revenue of Tianli Holdings (by Product), 2016-2019
Revenue of Tianli Holdings (by Region), 2016-2018
Main MLCC Products of Tianli Holdings
Revenue Breakdown and Structure of Chaozhou Three-circle (by Product), 2016-2019
Revenue Breakdown of Chaozhou Three-circle (by Region), 2011-2019
Revenue of Torch Electron (by Product), 2016-2019
Revenue of Torch Electron (by Region), 2013-2019
Gross Margin of Torch Electron by Product, 2016-2019
Main Products of Torch Electron
Main Capacitor Production Lines of Torch Electron
Revenue Structure of Walsin (by Product), 2013-2018
Revenue Breakdown of Walsin (by Region), 2015-2018
Capacity and Output of Walsin (by Product), 2015-2018
Sales Volume and Value of Walsin (by Product), 2017-2018
Basic Information of Dongguan Walsin Technology Electronics
Revenue Structure of Yageo (by Product), 2013-2018
Revenue Structure of Yageo (by Region), 2012-2018
MLCC Product Series of Yageo
Capacity and Output of Yageo (by Product), 2015-2018
Sales Volume and Value of Yageo (by Product), 2017-2018
Basic Information of Yageo Electronics (China)
Revenue Structure of Holy Stone by Product, 2013-2018



Revenue Structure of Holy Stone by Region, 2016-2018

MLCC Product Series of Holy Stone

Capacity and Output of Holy Stone, 2016-2018

Sales Volume and Value of Holy Stone, 2017-2018

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