

Global Automotive-Grade Multilayer Ceramic Capacitor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive-Grade Multilayer Ceramic Capacitor market size is expected to reach \$ 572 million by 2032, rising at a market growth of 7.1% CAGR during the forecast period (2026-2032).

Automotive-Grade Multilayer Ceramic Capacitor, or automotive MLCC, is a surface-mount passive component manufactured by alternately stacking thin ceramic dielectric layers and internal metal electrodes, pressing and co-firing the structure, and applying external terminations to form a monolithic capacitor. Automotive MLCCs store and release electrical charge and are widely used for power-supply smoothing, decoupling, filtering, noise suppression, signal coupling, resonant circuits and voltage stabilization in vehicle electronics. Compared with general-purpose MLCCs, these products are designed for greater resistance to temperature cycling, humidity, mechanical shock, vibration, printed-circuit-board flexure and long operating periods. Automotive portfolios include Class I dielectrics such as C0G or NP0 for high stability and low loss, together with Class II dielectrics such as X5R, X7R, X7S, X7T and X8R for higher capacitance density. Product configurations include standard, soft or flexible terminations, metal-terminal structures, conductive-adhesive-compatible finishes, high-temperature grades and medium- to high-voltage designs. AEC-Q200 provides the principal stress-test qualification framework for automotive passive components, while individual automakers and Tier 1 suppliers may impose additional qualification, PPAP, change-control and application-specific requirements. This study focuses on chip-type automotive MLCCs supplied for powertrain, chassis, safety, ADAS, cockpit, body electronics, lighting, connectivity and electrified-vehicle power systems.

Key Findings

Global production reached approximately 435.48 million units in 2025

Global installed production capacity reached approximately 480.00 million units in 2025

Estimated global production capacity utilization reached approximately 90.7% in 2025

The global average selling price reached approximately US\$806 per thousand units in 2025

The average industry gross margin reached approximately 22–27% in 2025

Market Trends

The Automotive-Grade Multilayer Ceramic Capacitor market is moving simultaneously toward smaller case sizes, higher capacitance, higher voltage capability and stronger mechanical reliability. Electrification, 48 V electrical architectures, centralized vehicle computing and increasingly sophisticated ADAS systems require more capacitance to be installed within limited printed-circuit-board space. Murata's recent automotive product developments include higher-capacitance components in 0201-inch packages and a 2.2 μ F, 100 V soft-termination MLCC in an 0805-inch package, illustrating the industry's effort to raise capacitance-voltage density without increasing mounting area. Soft or flexible terminations are expanding from selected safety circuits toward a broader range of ECUs because the conductive-resin layer absorbs board-flex and thermal-expansion stress that could otherwise crack the ceramic body. Metal-terminal, serial-electrode, open-mode and other fail-safe constructions are also gaining relevance where short-circuit failure must be reduced. High-temperature products such as X8R, X8L and related dielectric systems support under-hood and power-electronics applications, while high-voltage C0G and X7R products are being developed for onboard chargers, DC-DC converters and resonant power circuits. Design competition is increasingly influenced by effective capacitance under DC bias rather than nominal capacitance alone, particularly for Class II dielectrics. Manufacturers are also improving simulation models, traceability, PPAP support and production-change controls because automotive customers require stable electrical behavior and long-term supply across

vehicle-platform lifecycles.

Market Dynamics

Drivers

Demand is driven by global vehicle production, rising electronic content per vehicle and the transition from mechanical and hydraulic functions toward electronically controlled systems. Global motor-vehicle production reached approximately 96.4 million units in 2025, while worldwide electric-car sales rose to approximately 21 million units, representing about one-quarter of new-car sales. Electric and software-defined vehicles require additional battery-management electronics, DC-DC conversion, onboard charging, traction-inverter controls, thermal management, domain controllers, high-speed communications, sensors and high-resolution displays. Each subsystem uses multiple MLCCs for local decoupling, filtering, voltage stabilization and electromagnetic-noise control. ADAS and automated-driving computers further increase capacitor demand because high-speed processors, memory devices, cameras, radar modules and vehicle-network interfaces require dense power-distribution and signal-conditioning networks. The replacement of 12 V-only architectures with 48 V subsystems increases demand for compact 100 V products, while 400 V and 800 V traction systems create opportunities for high-voltage MLCCs in isolated power supplies, gate drivers, resonant circuits and auxiliary converters. Vehicle manufacturers also increasingly specify soft terminations and higher-reliability structures to reduce field failures arising from vibration, thermal cycling and PCB bending.

Restraints

Market growth is restrained by automotive qualification requirements, long design-in cycles, raw-material sensitivity and aggressive component-cost targets. AEC-Q200 qualification involves multiple environmental, mechanical and electrical stress tests, but passing the standard does not automatically qualify a component for every vehicle platform or safety-critical circuit. Automakers and Tier 1 suppliers may additionally require PPAP documentation, manufacturing-site approval, extended temperature cycling, board-flex testing, failure-mode analysis and advance notification of material or process changes. MLCC performance is also strongly dependent on dielectric class, package size, applied voltage and temperature. High-capacitance Class II capacitors can lose a material portion of their effective capacitance under DC bias, requiring

designers to select larger components or install several capacitors in parallel. Ceramic brittleness creates a continuing risk of flex cracking, solder cracking and latent field failure, particularly near PCB edges, connectors or mounting points. Upstream costs are influenced by ceramic powders, nickel or precious-metal electrode materials, copper, silver-bearing conductive resins and energy-intensive firing processes. The analyst-estimated capacity utilization of approximately 90.7% indicates relatively limited production headroom within the defined market scope, which can increase lead-time and allocation risk when automotive demand rises quickly or qualified production lines undergo maintenance and customer revalidation.

Opportunities

The strongest opportunities are associated with electrified powertrains, 48 V electrical systems, high-performance computing, zonal vehicle architectures and high-temperature electronics. Wider adoption of 48 V mild-hybrid and auxiliary systems requires automotive MLCCs that combine 100 V ratings, high capacitance and compact case sizes. Battery-management systems and traction-power electronics create demand for high-reliability decoupling, isolation, sensing and filtering components, while onboard chargers and DC-DC converters support medium- and high-voltage C0G and X7R products. TDK's automotive portfolio extends from medium-voltage products in the 100–630 V range to high-voltage MLCCs of 1–3 kV, demonstrating the expanding addressable range for ceramic capacitors in EV power conversion. Soft termination, floating-electrode, serial and metal-terminal configurations provide further opportunities in safety-related systems by absorbing mechanical stress or reducing the probability of short-circuit failure. ADAS, automated driving and intelligent cockpits also support ultra-small, high-capacitance products because centralized processors require dense decoupling networks. China provides a significant localization opportunity as domestic vehicle and Tier 1 manufacturers seek qualified local sources; VIYONG has developed AEC-Q200 automotive series covering high-voltage, high-capacitance, miniature, wide-temperature and soft-termination products. Additional opportunities exist for suppliers offering electrical simulation, application-specific derating guidance, PPAP support and guaranteed long-term production continuity alongside the component itself.

Challenges

The main technical challenge is increasing capacitance and voltage rating while retaining reliability in progressively smaller ceramic bodies. Thinner dielectric layers increase capacitance density but place greater demands on ceramic-powder uniformity,

electrode printing, layer alignment, co-firing and defect inspection. Automotive applications must control insulation-resistance degradation, dielectric breakdown, electrode migration, thermal cracking and humidity-related failures over long operating periods. Mechanical reliability is equally important because MLCCs may crack during PCB depanelization, connector insertion, enclosure assembly or repeated vehicle thermal cycling. Soft termination reduces transmitted stress but introduces additional material, process and electrical-resistance considerations. High-voltage designs must prevent surface arcing and maintain adequate creepage behavior, while high-capacitance Class II products require careful treatment of DC-bias, aging and temperature effects. Safety-critical programs also require stable manufacturing sites, traceable lots and strict change management, which can limit rapid movement of production between factories. Suppliers must therefore combine proprietary dielectric materials, ultra-precise multilayer processing, automated inspection and automotive quality systems. A further commercial challenge is maintaining economically attractive prices as customers demand smaller dimensions, higher capacitance, higher voltages, wider temperature ranges and additional reliability testing within the same component.

Industry Chain Analysis

The upstream industry chain includes barium titanate and other ceramic dielectric powders, dopants and sintering additives, nickel or precious-metal electrode pastes, copper, silver and conductive-polymer termination materials, plating chemicals, organic binders, solvents, carrier films, packaging tapes and semiconductor-grade process equipment. Class II MLCCs commonly use high-permittivity ferroelectric ceramic formulations to maximize capacitance density, while C0G or NP0 products use more stable dielectric systems for low-loss and high-frequency applications. Material particle size, purity and dispersion influence dielectric thickness, breakdown strength and electrical uniformity. Internal-electrode paste quality affects layer continuity, while conductive resin and metal-terminal materials determine resistance to board bending and thermal stress. Equipment suppliers provide tape casting, screen printing, stacking, lamination, cutting, binder removal, firing, termination, plating, electrical testing and visual-inspection systems.

The midstream manufacturing process converts ceramic slurry into thin green sheets, prints internal electrodes, stacks hundreds or more alternating layers, laminates and dices the structure, removes organic binders and co-fires the ceramic and electrodes into a monolithic body. Manufacturers then apply external terminations, nickel and tin plating, conductive-resin layers or metal terminals before electrical screening, reliability

testing, taping and shipment. Downstream customers include automotive electronics Tier 1 suppliers, ECU manufacturers, power-module companies, lighting suppliers, sensor manufacturers, infotainment and cockpit companies, contract electronics manufacturers and vehicle OEMs. Value creation is concentrated in dielectric formulation, layer miniaturization, high-capacitance design, defect control, soft-termination technology, automotive qualification and application support. Customer-approved automotive production lines and long-term change-control systems create higher barriers than ordinary commercial MLCC manufacturing.

Segment Insights

By Dielectric or Temperature Characteristic, the analyst's classification is directionally appropriate but should be interpreted according to operating temperature, capacitance stability and intended circuit function. C0G or NP0 automotive MLCCs are Class I capacitors with very low loss, negligible aging and strong voltage and temperature stability, making them suitable for timing, resonant, RF, snubber and high-frequency power circuits. X5R products provide high capacitance density but generally have a lower maximum operating temperature than X7- and X8-series products, making them more suitable for controlled-temperature body, cockpit and infotainment applications when specifically automotive-qualified. X7R is the broadest high-capacitance category for operation up to 125°C, while X7S and X7T trade wider capacitance variation for increased capacitance density. X8R supports operation up to 150°C and is relevant to under-hood, powertrain and power-electronic environments. The classification should be expanded with X8L or other proprietary high-temperature dielectrics where material, temperature and capacitance-change limits differ by supplier. U2J and other stable Class I formulations may also be retained under Other Automotive Dielectrics rather than being forced into the C0G category.

By Termination and Mechanical-Reliability Design, the recommended categories are Standard-Termination Automotive MLCC, Soft- or Flexible-Termination Automotive MLCC, Metal-Terminal or Lead-Frame Automotive MLCC, Conductive-Adhesive-Compatible Automotive MLCC and Fail-Safe Electrode-Design Automotive MLCC. Standard terminations dominate cost-sensitive and mechanically controlled board locations. Soft terminations incorporate a conductive-resin layer that absorbs PCB bending and thermal-expansion stress. Metal-terminal structures elevate the ceramic body from the PCB and improve resistance to solder-joint and board-flex stress, although they should be viewed as a package architecture rather than simply an electrode finish. Conductive-adhesive-compatible products use suitable external

finishes for silver epoxy and specialized assembly methods. Open-mode, floating-electrode and serial designs do not constitute termination types and should therefore be classified separately as fail-safe electrode designs. TDK, KYOCERA AVX, KEMET, YAGEO, TAIYO YUDEN, Walsin and Holy Stone all provide flexible-termination or related high-reliability structures.

By Rated Voltage, the proposed categories of Up to 50 V, 51–100 V, 101–630 V and Above 630 V are commercially useful. Products up to 50 V are primarily used in low-voltage logic, sensor, infotainment and conventional 12 V circuits. The 51–100 V segment is increasingly important for 48 V systems, automotive network electronics and circuits requiring additional derating. Products rated at 101–630 V serve power supplies, gate drivers, onboard chargers, battery-management circuits and auxiliary power converters. Products above 630 V address traction-power, high-voltage resonant, charging, isolation and switching applications and can extend to 1–3 kV or higher in specialized portfolios. The final category should be written as 631 V and Above to eliminate ambiguity. Rated voltage should not be analyzed independently from dielectric type, case size, effective capacitance, creepage requirements and manufacturer-recommended derating.

Downstream Market Opportunities

Passenger Cars form the largest volume application because they represent most global vehicle production and increasingly use electronic systems across almost every functional domain. Commercial Vehicles form a smaller but meaningful market covering trucks, buses, vans, construction vehicles and off-highway platforms, where longer operating hours, elevated vibration and harsh environmental conditions can support higher-reliability and high-temperature products. Vehicle-type classification should be supplemented by a By Electronic System structure comprising Powertrain and Engine Control; Electrified Powertrain, OBC, Inverter and DC-DC Converter; Battery Management and Charging; ADAS and Safety Systems; Body, Chassis and Comfort Electronics; Infotainment, Cockpit and Connectivity; and Lighting and Thermal Management. Body and cockpit electronics generate broad unit volume through numerous low-voltage ECUs, displays and communication modules. ADAS and domain controllers create high MLCC counts through processor decoupling and noise filtering. Electrified-powertrain systems offer the strongest value opportunity because they require high-voltage, high-temperature, soft-termination and fail-safe products. Commercial vehicles additionally provide opportunities in telematics, fleet control, power steering, brake control, lighting, advanced driver assistance and electrified auxiliary

systems.

Regional Insights

Asia-Pacific is the principal production base and the largest vehicle-electronics demand region. Japan contains Murata, TDK and TAIYO YUDEN, which have deep capabilities in ceramic materials, miniaturization, high-capacitance MLCCs and automotive reliability. South Korea is represented by Samsung Electro-Mechanics, whose automotive portfolio includes AEC-Q200 products and newer high-voltage X7T components for hybrid and electric-vehicle inverter applications. Taiwan contains YAGEO Group, Walsin Technology and Holy Stone, with portfolios spanning standard automotive, soft-termination, high-temperature and high-voltage MLCCs. China combines the world's largest vehicle-manufacturing base with expanding domestic passive-component production, including VIIYONG's automotive MLCC series. The region therefore covers both global premium suppliers and emerging localized manufacturers, while customer approval, consistency and long-term reliability remain major differentiators.

Europe and North America are important high-value demand and application-engineering markets, particularly for powertrain, safety systems, premium vehicles and electrified power conversion. KYOCERA AVX and Vishay maintain automotive MLCC portfolios with flexible terminations, conductive-adhesive compatibility, high-temperature products and PPAP support. KEMET retains a broad automotive ceramic-capacitor brand portfolio, although it is now part of YAGEO Group and should be consolidated with YAGEO when evaluating parent-company competition or market concentration. European and North American automakers frequently apply additional supplier-specific qualification, production-change and traceability requirements beyond basic AEC-Q200 testing. Regional engineering centers consequently influence dielectric selection, derating, fail-safe design and approved manufacturing locations even when a significant portion of physical production is located in Asia.

Competitive Landscape Analysis

The analyst's company list contains genuine automotive MLCC suppliers, but group relationships should be corrected to avoid double counting. Murata Manufacturing and TDK form a leading Japanese supplier group with broad portfolios covering miniature, high-capacitance, high-temperature, soft-termination, metal-terminal and high-voltage

products. Samsung Electro-Mechanics is a major Korean participant with AEC-Q200 automotive series and expanding high-voltage and high-capacitance products. TAIYO YUDEN offers automotive-grade MLCCs, including soft-termination products with enhanced resistance to board bending and thermal shock. YAGEO is an important Taiwanese supplier through its AC standard automotive, AS soft-termination, high-capacitance and high-temperature series. KEMET remains a valid product brand with C0G, X7R, X8R, flexible-termination and high-voltage automotive MLCCs, but KEMET is part of YAGEO Group and should not be treated as an independent parent company when calculating shares.

KYOCERA AVX competes through standard automotive and FLEXITERM products, including products designed to withstand greater board flex and temperature cycling. Vishay supplies automotive surface-mount MLCCs, conductive-epoxy-compatible products and high-temperature leaded ceramic capacitors with AEC-Q200 qualification and PPAP availability. Guangdong VIIYONG Electronic Technology is a verified Chinese automotive MLCC manufacturer; its portfolio covers high-voltage, high-capacitance, miniature, wide-temperature and soft-termination series. Walsin provides AEC-Q200 MT series, soft-termination ST and VW 80808-related products, while Holy Stone supplies AEC-Q200 automotive MLCCs with polymer terminations and voltage ratings extending into high-voltage applications. Competition centers on dielectric formulation, capacitance-voltage density, effective capacitance, flex resistance, defect rates, OEM qualification, PPAP capability, delivery continuity and local engineering support. No reliable evidence supports a precise global market-share ranking among the listed manufacturers. The analyst-estimated gross margin of 22–27% reflects a blended market in which standard low-voltage products and proprietary high-capacitance, soft-termination, high-temperature or high-voltage products can have materially different profitability.

Report Scope

This report studies the global Automotive-Grade Multilayer Ceramic Capacitor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive-Grade Multilayer Ceramic Capacitor and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive-Grade Multilayer Ceramic Capacitor that contribute to its increasing demand across

many markets.

Highlights and key features of the study

Global Automotive-Grade Multilayer Ceramic Capacitor total production and demand, 2021-2032, (Million Units)

Global Automotive-Grade Multilayer Ceramic Capacitor total production value, 2021-2032, (USD Million)

Global Automotive-Grade Multilayer Ceramic Capacitor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Automotive-Grade Multilayer Ceramic Capacitor consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Automotive-Grade Multilayer Ceramic Capacitor domestic production, consumption, key domestic manufacturers and share

Global Automotive-Grade Multilayer Ceramic Capacitor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Automotive-Grade Multilayer Ceramic Capacitor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Automotive-Grade Multilayer Ceramic Capacitor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Automotive-Grade Multilayer Ceramic Capacitor market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Murata Manufacturing, TDK, Samsung Electro-Mechanics, TAIYO YUDEN, YAGEO, KYOCERA AVX Components, KEMET, Vishay Intertechnology, Guangdong Viiyong Electronic Technology, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive-Grade Multilayer Ceramic Capacitor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive-Grade Multilayer Ceramic Capacitor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Automotive-Grade Multilayer Ceramic Capacitor Market, Segmentation by Type:

C0G (NP0) Automotive MLCC

X5R Automotive MLCC

X7R Automotive MLCC

X7S Automotive MLCC

X7T Automotive MLCC

X8R Automotive MLCC

Global Automotive-Grade Multilayer Ceramic Capacitor Market, Segmentation by Termination Type:

Standard-Termination Automotive MLCC

Soft-Termination Automotive MLCC

Metal-Terminal Automotive MLCC

Conductive-Adhesive-Compatible Automotive MLCC

Global Automotive-Grade Multilayer Ceramic Capacitor Market, Segmentation by Rated Voltage:

Up to 50 V Automotive MLCC

51–100 V Automotive MLCC

101–630 V Automotive MLCC

Above 630 V Automotive MLCC

Global Automotive-Grade Multilayer Ceramic Capacitor Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

Companies Profiled:

Murata Manufacturing

TDK

Samsung Electro-Mechanics

TAIYO YUDEN

YAGEO

KYOCERA AVX Components

KEMET

Vishay Intertechnology

Guangdong Viiyong Electronic Technology

Key Questions Answered:

1. How big is the global Automotive-Grade Multilayer Ceramic Capacitor market?
2. What is the demand of the global Automotive-Grade Multilayer Ceramic Capacitor market?
3. What is the year over year growth of the global Automotive-Grade Multilayer Ceramic Capacitor market?

4. What is the production and production value of the global Automotive-Grade Multilayer Ceramic Capacitor market?
5. Who are the key producers in the global Automotive-Grade Multilayer Ceramic Capacitor market?
6. What are the growth factors driving the market demand?

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