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Global Automotive-Grade Multilayer Ceramic Capacitor Market Growth 2026-2032

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Abstracts

The global Automotive-Grade Multilayer Ceramic Capacitor market size is predicted to grow from US$ 343 million in 2025 to US$ 558 million in 2032; it is expected to grow at a CAGR of 7.6% from 2026 to 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

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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 ?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

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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

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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; VIIYONG 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,

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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

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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

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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

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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

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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

LP Information, Inc. (LPI) ' newest research report, the “Automotive-Grade Multilayer Ceramic Capacitor Industry Forecast” looks at past sales and reviews total world Automotive-Grade Multilayer Ceramic Capacitor sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive-Grade Multilayer Ceramic Capacitor sales for 2026 through 2032. With Automotive-Grade Multilayer Ceramic Capacitor sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automotive-Grade Multilayer Ceramic Capacitor industry.

This Insight Report provides a comprehensive analysis of the global Automotive-Grade Multilayer Ceramic Capacitor landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive-Grade Multilayer Ceramic Capacitor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Automotive-Grade Multilayer Ceramic Capacitor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive-Grade Multilayer Ceramic Capacitor and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global

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Automotive-Grade Multilayer Ceramic Capacitor.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive-Grade Multilayer Ceramic Capacitor market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

C0G (NP0) Automotive MLCC

X5R Automotive MLCC

X7R Automotive MLCC

X7S Automotive MLCC

X7T Automotive MLCC

X8R Automotive MLCC

Segmentation by Termination Type:

Standard-Termination Automotive MLCC

Soft-Termination Automotive MLCC

Metal-Terminal Automotive MLCC

Conductive-Adhesive-Compatible Automotive MLCC

Segmentation by Rated Voltage:

Up to 50 V Automotive MLCC

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51–100 V Automotive MLCC

101–630 V Automotive MLCC

Above 630 V Automotive MLCC

Segmentation by Application:

Passenger Cars

Commercial Vehicles

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

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Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Murata Manufacturing

TDK

Samsung Electro-Mechanics

TAIYO YUDEN

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YAGEO

KYOCERA AVX Components

KEMET

Vishay Intertechnology

Guangdong Viiyong Electronic Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive-Grade Multilayer Ceramic Capacitor market?

What factors are driving Automotive-Grade Multilayer Ceramic Capacitor market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive-Grade Multilayer Ceramic Capacitor market opportunities vary by end market size?

How does Automotive-Grade Multilayer Ceramic Capacitor break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Automotive-Grade Multilayer Ceramic Capacitor by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Automotive-Grade Multilayer Ceramic Capacitor by Country/Region, 2021, 2025 & 2032
2.2 Automotive-Grade Multilayer Ceramic Capacitor Segment by Type
  2.2.1 C0G (NP0) Automotive MLCC
  2.2.2 X5R Automotive MLCC
  2.2.3 X7R Automotive MLCC
  2.2.4 X7S Automotive MLCC
  2.2.5 X7T Automotive MLCC
  2.2.6 X8R Automotive MLCC
  2.2.7 Automotive-Grade Multilayer Ceramic Capacitor Sales by Type
    2.2.7.1 Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Type (2021-2026)
    2.2.7.2 Global Automotive-Grade Multilayer Ceramic Capacitor Revenue and Market Share by Type (2021-2026)
    2.2.7.3 Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Type (2021-2026)
2.3 Automotive-Grade Multilayer Ceramic Capacitor Segment by Termination Type
  2.3.1 Standard-Termination Automotive MLCC
  2.3.2 Soft-Termination Automotive MLCC
  2.3.3 Metal-Terminal Automotive MLCC

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info@marketpublishers.com

2.3.4 Conductive-Adhesive-Compatible Automotive MLCC
2.3.5 Automotive-Grade Multilayer Ceramic Capacitor Sales by Termination Type
2.3.5.1 Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Termination Type (2021-2026)
2.3.5.2 Global Automotive-Grade Multilayer Ceramic Capacitor Revenue and Market Share by Termination Type (2021-2026)
2.3.5.3 Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Termination Type (2021-2026)
2.4 Automotive-Grade Multilayer Ceramic Capacitor Segment by Rated Voltage
2.4.1 Up to 50 V Automotive MLCC
2.4.2 51–100 V Automotive MLCC
2.4.3 101–630 V Automotive MLCC
2.4.4 Above 630 V Automotive MLCC
2.4.5 Automotive-Grade Multilayer Ceramic Capacitor Sales by Rated Voltage
2.4.5.1 Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Rated Voltage (2021-2026)
2.4.5.2 Global Automotive-Grade Multilayer Ceramic Capacitor Revenue and Market Share by Rated Voltage (2021-2026)
2.4.5.3 Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Rated Voltage (2021-2026)
2.5 Automotive-Grade Multilayer Ceramic Capacitor Segment by Application
2.5.1 Passenger Cars
2.5.2 Commercial Vehicles
2.5.3 Automotive-Grade Multilayer Ceramic Capacitor Sales by Application
2.5.3.1 Global Automotive-Grade Multilayer Ceramic Capacitor Sale Market Share by Application (2021-2026)
2.5.3.2 Global Automotive-Grade Multilayer Ceramic Capacitor Revenue and Market Share by Application (2021-2026)
2.5.3.3 Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automotive-Grade Multilayer Ceramic Capacitor Breakdown Data by Company
3.1.1 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Sales by Company (2021-2026)
3.1.2 Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Company (2021-2026)

+357 96 030922
info@marketpublishers.com

3.2 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Revenue by Company (2021-2026)
3.2.1 Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Company (2021-2026)
3.2.2 Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Company (2021-2026)
3.3 Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Company
3.4 Key Manufacturers Automotive-Grade Multilayer Ceramic Capacitor Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Automotive-Grade Multilayer Ceramic Capacitor Product Location Distribution
3.4.2 Players Automotive-Grade Multilayer Ceramic Capacitor Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AUTOMOTIVE-GRADE MULTILAYER CERAMIC CAPACITOR BY GEOGRAPHIC REGION

4.1 World Historic Automotive-Grade Multilayer Ceramic Capacitor Market Size by Geographic Region (2021-2026)
4.1.1 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Automotive-Grade Multilayer Ceramic Capacitor Market Size by Country/Region (2021-2026)
4.2.1 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Sales by Country/Region (2021-2026)
4.2.2 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Revenue by Country/Region (2021-2026)
4.3 Americas Automotive-Grade Multilayer Ceramic Capacitor Sales Growth
4.4 APAC Automotive-Grade Multilayer Ceramic Capacitor Sales Growth
4.5 Europe Automotive-Grade Multilayer Ceramic Capacitor Sales Growth
4.6 Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales Growth

5 AMERICAS

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info@marketpublishers.com

5.1 Americas Automotive-Grade Multilayer Ceramic Capacitor Sales by Country
5.1.1 Americas Automotive-Grade Multilayer Ceramic Capacitor Sales by Country (2021-2026)
5.1.2 Americas Automotive-Grade Multilayer Ceramic Capacitor Revenue by Country (2021-2026)
5.2 Americas Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026)
5.3 Americas Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Automotive-Grade Multilayer Ceramic Capacitor Sales by Region
6.1.1 APAC Automotive-Grade Multilayer Ceramic Capacitor Sales by Region (2021-2026)
6.1.2 APAC Automotive-Grade Multilayer Ceramic Capacitor Revenue by Region (2021-2026)
6.2 APAC Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026)
6.3 APAC Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Automotive-Grade Multilayer Ceramic Capacitor by Country
7.1.1 Europe Automotive-Grade Multilayer Ceramic Capacitor Sales by Country (2021-2026)
7.1.2 Europe Automotive-Grade Multilayer Ceramic Capacitor Revenue by Country

+357 96 030922
info@marketpublishers.com

(2021-2026)
7.2 Europe Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026)
7.3 Europe Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor by Country
  8.1.1 Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Revenue by Country (2021-2026)
8.2 Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026)
8.3 Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Automotive-Grade Multilayer Ceramic Capacitor
10.3 Manufacturing Process Analysis of Automotive-Grade Multilayer Ceramic

+357 96 030922
info@marketpublishers.com

Capacitor
10.4 Industry Chain Structure of Automotive-Grade Multilayer Ceramic Capacitor

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Automotive-Grade Multilayer Ceramic Capacitor Distributors
11.3 Automotive-Grade Multilayer Ceramic Capacitor Customer

12 WORLD FORECAST REVIEW FOR AUTOMOTIVE-GRADE MULTILAYER CERAMIC CAPACITOR BY GEOGRAPHIC REGION

12.1 Global Automotive-Grade Multilayer Ceramic Capacitor Market Size Forecast by Region
  12.1.1 Global Automotive-Grade Multilayer Ceramic Capacitor Forecast by Region (2027-2032)
  12.1.2 Global Automotive-Grade Multilayer Ceramic Capacitor Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Automotive-Grade Multilayer Ceramic Capacitor Forecast by Type (2027-2032)
12.7 Global Automotive-Grade Multilayer Ceramic Capacitor Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Murata Manufacturing
  13.1.1 Murata Manufacturing Company Information
  13.1.2 Murata Manufacturing Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
  13.1.3 Murata Manufacturing Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 Murata Manufacturing Main Business Overview
  13.1.5 Murata Manufacturing Latest Developments

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13.2 TDK
13.2.1 TDK Company Information
13.2.2 TDK Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.2.3 TDK Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 TDK Main Business Overview
13.2.5 TDK Latest Developments
13.3 Samsung Electro-Mechanics
13.3.1 Samsung Electro-Mechanics Company Information
13.3.2 Samsung Electro-Mechanics Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.3.3 Samsung Electro-Mechanics Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Samsung Electro-Mechanics Main Business Overview
13.3.5 Samsung Electro-Mechanics Latest Developments
13.4 TAIYO YUDEN
13.4.1 TAIYO YUDEN Company Information
13.4.2 TAIYO YUDEN Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.4.3 TAIYO YUDEN Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 TAIYO YUDEN Main Business Overview
13.4.5 TAIYO YUDEN Latest Developments
13.5 YAGEO
13.5.1 YAGEO Company Information
13.5.2 YAGEO Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.5.3 YAGEO Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 YAGEO Main Business Overview
13.5.5 YAGEO Latest Developments
13.6 KYOCERA AVX Components
13.6.1 KYOCERA AVX Components Company Information
13.6.2 KYOCERA AVX Components Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.6.3 KYOCERA AVX Components Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 KYOCERA AVX Components Main Business Overview

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13.6.5 KYOCERA AVX Components Latest Developments
13.7 KEMET
13.7.1 KEMET Company Information
13.7.2 KEMET Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.7.3 KEMET Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 KEMET Main Business Overview
13.7.5 KEMET Latest Developments
13.8 Vishay Intertechnology
13.8.1 Vishay Intertechnology Company Information
13.8.2 Vishay Intertechnology Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.8.3 Vishay Intertechnology Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Vishay Intertechnology Main Business Overview
13.8.5 Vishay Intertechnology Latest Developments
13.9 Guangdong Viiyong Electronic Technology
13.9.1 Guangdong Viiyong Electronic Technology Company Information
13.9.2 Guangdong Viiyong Electronic Technology Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
13.9.3 Guangdong Viiyong Electronic Technology Automotive-Grade Multilayer Ceramic Capacitor Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Guangdong Viiyong Electronic Technology Main Business Overview
13.9.5 Guangdong Viiyong Electronic Technology Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Automotive-Grade Multilayer Ceramic Capacitor Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Automotive-Grade Multilayer Ceramic Capacitor Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of C0G (NP0) Automotive MLCC
Table 4. Major Players of X5R Automotive MLCC
Table 5. Major Players of X7R Automotive MLCC
Table 6. Major Players of X7S Automotive MLCC
Table 7. Major Players of X7T Automotive MLCC
Table 8. Major Players of X8R Automotive MLCC
Table 9. Global Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026) & (Million Units)
Table 10. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Type (2021-2026)
Table 11. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Type (2021-2026) & ($ million)
Table 12. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Type (2021-2026)
Table 13. Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Type (2021-2026) & (US$/Unit)
Table 14. Major Players of Standard-Termination Automotive MLCC
Table 15. Major Players of Soft-Termination Automotive MLCC
Table 16. Major Players of Metal-Terminal Automotive MLCC
Table 17. Major Players of Conductive-Adhesive-Compatible Automotive MLCC
Table 18. Global Automotive-Grade Multilayer Ceramic Capacitor Sales by Termination Type (2021-2026) & (Million Units)
Table 19. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Termination Type (2021-2026)
Table 20. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Termination Type (2021-2026) & ($ million)
Table 21. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Termination Type (2021-2026)
Table 22. Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Termination Type (2021-2026) & (US$/Unit)
Table 23. Major Players of Up to 50 V Automotive MLCC

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Table 24. Major Players of 51–100 V Automotive MLCC
Table 25. Major Players of 101–630 V Automotive MLCC
Table 26. Major Players of Above 630 V Automotive MLCC
Table 27. Global Automotive-Grade Multilayer Ceramic Capacitor Sales by Rated Voltage (2021-2026) & (Million Units)
Table 28. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Rated Voltage (2021-2026)
Table 29. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Rated Voltage (2021-2026) & ($ million)
Table 30. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Rated Voltage (2021-2026)
Table 31. Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Rated Voltage (2021-2026) & (US$/Unit)
Table 32. Global Automotive-Grade Multilayer Ceramic Capacitor Sale by Application (2021-2026) & (Million Units)
Table 33. Global Automotive-Grade Multilayer Ceramic Capacitor Sale Market Share by Application (2021-2026)
Table 34. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Application (2021-2026) & ($ million)
Table 35. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Application (2021-2026)
Table 36. Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Application (2021-2026) & (US$/Unit)
Table 37. Global Automotive-Grade Multilayer Ceramic Capacitor Sales by Company (2021-2026) & (Million Units)
Table 38. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Company (2021-2026)
Table 39. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Company (2021-2026) & ($ millions)
Table 40. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Company (2021-2026)
Table 41. Global Automotive-Grade Multilayer Ceramic Capacitor Sale Price by Company (2021-2026) & (US$/Unit)
Table 42. Key Manufacturers Automotive-Grade Multilayer Ceramic Capacitor Producing Area Distribution and Sales Area
Table 43. Players Automotive-Grade Multilayer Ceramic Capacitor Products Offered
Table 44. Automotive-Grade Multilayer Ceramic Capacitor Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 45. New Products and Potential Entrants

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Table 46. Market M&A Activity & Strategy
Table 47. Global Automotive-Grade Multilayer Ceramic Capacitor Sales by Geographic Region (2021-2026) & (Million Units)
Table 48. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share Geographic Region (2021-2026)
Table 49. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Geographic Region (2021-2026) & ($ millions)
Table 50. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Geographic Region (2021-2026)
Table 51. Global Automotive-Grade Multilayer Ceramic Capacitor Sales by Country/Region (2021-2026) & (Million Units)
Table 52. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Country/Region (2021-2026)
Table 53. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue by Country/Region (2021-2026) & ($ millions)
Table 54. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Country/Region (2021-2026)
Table 55. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales by Country (2021-2026) & (Million Units)
Table 56. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Country (2021-2026)
Table 57. Americas Automotive-Grade Multilayer Ceramic Capacitor Revenue by Country (2021-2026) & ($ millions)
Table 58. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026) & (Million Units)
Table 59. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026) & (Million Units)
Table 60. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales by Region (2021-2026) & (Million Units)
Table 61. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Region (2021-2026)
Table 62. APAC Automotive-Grade Multilayer Ceramic Capacitor Revenue by Region (2021-2026) & ($ millions)
Table 63. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026) & (Million Units)
Table 64. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026) & (Million Units)
Table 65. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales by Country (2021-2026) & (Million Units)

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Table 66. Europe Automotive-Grade Multilayer Ceramic Capacitor Revenue by Country (2021-2026) & ($ millions)
Table 67. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026) & (Million Units)
Table 68. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026) & (Million Units)
Table 69. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales by Country (2021-2026) & (Million Units)
Table 70. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Country (2021-2026)
Table 71. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales by Type (2021-2026) & (Million Units)
Table 72. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales by Application (2021-2026) & (Million Units)
Table 73. Key Market Drivers & Growth Opportunities of Automotive-Grade Multilayer Ceramic Capacitor
Table 74. Key Market Challenges & Risks of Automotive-Grade Multilayer Ceramic Capacitor
Table 75. Key Industry Trends of Automotive-Grade Multilayer Ceramic Capacitor
Table 76. Automotive-Grade Multilayer Ceramic Capacitor Raw Material
Table 77. Key Suppliers of Raw Materials
Table 78. Automotive-Grade Multilayer Ceramic Capacitor Distributors List
Table 79. Automotive-Grade Multilayer Ceramic Capacitor Customer List
Table 80. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Forecast by Region (2027-2032) & (Million Units)
Table 81. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Forecast by Region (2027-2032) & ($ millions)
Table 82. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales Forecast by Country (2027-2032) & (Million Units)
Table 83. Americas Automotive-Grade Multilayer Ceramic Capacitor Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales Forecast by Region (2027-2032) & (Million Units)
Table 85. APAC Automotive-Grade Multilayer Ceramic Capacitor Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 86. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales Forecast by Country (2027-2032) & (Million Units)
Table 87. Europe Automotive-Grade Multilayer Ceramic Capacitor Revenue Forecast by Country (2027-2032) & ($ millions)

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Table 88. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales Forecast by Country (2027-2032) & (Million Units)
Table 89. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Revenue Forecast by Country (2027-2032) & ($ millions)
Table 90. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Forecast by Type (2027-2032) & (Million Units)
Table 91. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Forecast by Type (2027-2032) & ($ millions)
Table 92. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Forecast by Application (2027-2032) & (Million Units)
Table 93. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Forecast by Application (2027-2032) & ($ millions)
Table 94. Murata Manufacturing Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 95. Murata Manufacturing Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 96. Murata Manufacturing Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 97. Murata Manufacturing Main Business
Table 98. Murata Manufacturing Latest Developments
Table 99. TDK Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 100. TDK Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 101. TDK Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 102. TDK Main Business
Table 103. TDK Latest Developments
Table 104. Samsung Electro-Mechanics Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 105. Samsung Electro-Mechanics Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 106. Samsung Electro-Mechanics Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 107. Samsung Electro-Mechanics Main Business
Table 108. Samsung Electro-Mechanics Latest Developments
Table 109. TAIYO YUDEN Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors

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Table 110. TAIYO YUDEN Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 111. TAIYO YUDEN Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 112. TAIYO YUDEN Main Business
Table 113. TAIYO YUDEN Latest Developments
Table 114. YAGEO Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 115. YAGEO Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 116. YAGEO Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 117. YAGEO Main Business
Table 118. YAGEO Latest Developments
Table 119. KYOCERA AVX Components Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 120. KYOCERA AVX Components Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 121. KYOCERA AVX Components Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 122. KYOCERA AVX Components Main Business
Table 123. KYOCERA AVX Components Latest Developments
Table 124. KEMET Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 125. KEMET Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 126. KEMET Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 127. KEMET Main Business
Table 128. KEMET Latest Developments
Table 129. Vishay Intertechnology Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 130. Vishay Intertechnology Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 131. Vishay Intertechnology Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 132. Vishay Intertechnology Main Business

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Table 133. Vishay Intertechnology Latest Developments
Table 134. Guangdong Viiyong Electronic Technology Basic Information, Automotive-Grade Multilayer Ceramic Capacitor Manufacturing Base, Sales Area and Its Competitors
Table 135. Guangdong Viiyong Electronic Technology Automotive-Grade Multilayer Ceramic Capacitor Product Portfolios and Specifications
Table 136. Guangdong Viiyong Electronic Technology Automotive-Grade Multilayer Ceramic Capacitor Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 137. Guangdong Viiyong Electronic Technology Main Business
Table 138. Guangdong Viiyong Electronic Technology Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Automotive-Grade Multilayer Ceramic Capacitor
Figure 2. Automotive-Grade Multilayer Ceramic Capacitor Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Automotive-Grade Multilayer Ceramic Capacitor Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Country/Region (2025)
Figure 10. Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of C0G (NP0) Automotive MLCC
Figure 12. Product Picture of X5R Automotive MLCC
Figure 13. Product Picture of X7R Automotive MLCC
Figure 14. Product Picture of X7S Automotive MLCC
Figure 15. Product Picture of X7T Automotive MLCC
Figure 16. Product Picture of X8R Automotive MLCC
Figure 17. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Type in 2026
Figure 18. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Type (2021-2026)
Figure 19. Product Picture of Standard-Termination Automotive MLCC
Figure 20. Product Picture of Soft-Termination Automotive MLCC
Figure 21. Product Picture of Metal-Terminal Automotive MLCC
Figure 22. Product Picture of Conductive-Adhesive-Compatible Automotive MLCC
Figure 23. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Termination Type in 2026
Figure 24. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Termination Type (2021-2026)
Figure 25. Product Picture of Up to 50 V Automotive MLCC
Figure 26. Product Picture of 51–100 V Automotive MLCC

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Figure 27. Product Picture of 101–630 V Automotive MLCC
Figure 28. Product Picture of Above 630 V Automotive MLCC
Figure 29. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Rated Voltage in 2026
Figure 30. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Rated Voltage (2021-2026)
Figure 31. Automotive-Grade Multilayer Ceramic Capacitor Consumed in Passenger Cars
Figure 32. Global Automotive-Grade Multilayer Ceramic Capacitor Market: Passenger Cars (2021-2026) & (Million Units)
Figure 33. Automotive-Grade Multilayer Ceramic Capacitor Consumed in Commercial Vehicles
Figure 34. Global Automotive-Grade Multilayer Ceramic Capacitor Market: Commercial Vehicles (2021-2026) & (Million Units)
Figure 35. Global Automotive-Grade Multilayer Ceramic Capacitor Sale Market Share by Application (2025)
Figure 36. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Application in 2025
Figure 37. Automotive-Grade Multilayer Ceramic Capacitor Sales by Company in 2025 (Million Units)
Figure 38. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Company in 2025
Figure 39. Automotive-Grade Multilayer Ceramic Capacitor Revenue by Company in 2025 ($ millions)
Figure 40. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Company in 2025
Figure 41. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Geographic Region (2021-2026)
Figure 42. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Geographic Region in 2025
Figure 43. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales 2021-2026 (Million Units)
Figure 44. Americas Automotive-Grade Multilayer Ceramic Capacitor Revenue 2021-2026 ($ millions)
Figure 45. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales 2021-2026 (Million Units)
Figure 46. APAC Automotive-Grade Multilayer Ceramic Capacitor Revenue 2021-2026 ($ millions)
Figure 47. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales 2021-2026

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(Million Units)
Figure 48. Europe Automotive-Grade Multilayer Ceramic Capacitor Revenue 2021-2026 ($ millions)
Figure 49. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales 2021-2026 (Million Units)
Figure 50. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Revenue 2021-2026 ($ millions)
Figure 51. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Country in 2025
Figure 52. Americas Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Country (2021-2026)
Figure 53. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Type (2021-2026)
Figure 54. Americas Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Application (2021-2026)
Figure 55. United States Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 56. Canada Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 57. Mexico Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 58. Brazil Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 59. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Region in 2025
Figure 60. APAC Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Region (2021-2026)
Figure 61. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Type (2021-2026)
Figure 62. APAC Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Application (2021-2026)
Figure 63. China Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 64. Japan Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 65. South Korea Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 66. Southeast Asia Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)

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Figure 67. India Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 68. Australia Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 69. China Taiwan Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 70. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Country in 2025
Figure 71. Europe Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share by Country (2021-2026)
Figure 72. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Type (2021-2026)
Figure 73. Europe Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Application (2021-2026)
Figure 74. Germany Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 75. France Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 76. UK Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 77. Italy Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 78. Russia Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 79. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Country (2021-2026)
Figure 80. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Type (2021-2026)
Figure 81. Middle East & Africa Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share by Application (2021-2026)
Figure 82. Egypt Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 83. South Africa Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 84. Israel Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 85. Turkey Automotive-Grade Multilayer Ceramic Capacitor Revenue Growth 2021-2026 ($ millions)
Figure 86. GCC Countries Automotive-Grade Multilayer Ceramic Capacitor Revenue

+357 96 030922
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Growth 2021-2026 ($ millions)
Figure 87. Manufacturing Cost Structure Analysis of Automotive-Grade Multilayer Ceramic Capacitor in 2026
Figure 88. Manufacturing Process Analysis of Automotive-Grade Multilayer Ceramic Capacitor
Figure 89. Industry Chain Structure of Automotive-Grade Multilayer Ceramic Capacitor
Figure 90. Channels of Distribution
Figure 91. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Forecast by Region (2027-2032)
Figure 92. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share Forecast by Region (2027-2032)
Figure 93. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share Forecast by Type (2027-2032)
Figure 94. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share Forecast by Type (2027-2032)
Figure 95. Global Automotive-Grade Multilayer Ceramic Capacitor Sales Market Share Forecast by Application (2027-2032)
Figure 96. Global Automotive-Grade Multilayer Ceramic Capacitor Revenue Market Share Forecast by Application (2027-2032)

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