

# Asia-Pacific MLCC - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The Asia-Pacific MLCC Market size is estimated at 13.29 billion USD in 2024, and is expected to reach 35.63 billion USD by 2029, growing at a CAGR of 21.81% during the forecast period (2024-2029).

The demand for 0 201 MLCCs is driven by the growing demand for consumer electronics and medical equipment in the region

0 201 emerged as the frontrunner, capturing the largest market share of 46.85%, followed closely by 1 005 with 16.20% and 0 402 with 12.01% in terms of volume in 2022.

Dielectrics classified as Class 1 can be divided into C0G, X8G, and U2J. The C0G MLCCs with low-mid range capacitance are becoming increasingly popular in the consumer electronic electronics industry, particularly in smartphones, smartwatches, and other devices, due to the increasing trend toward miniaturization in order to achieve sleeker designs.

Class 2 dielectric MLCCs are classified into X7R, X5R, and Y5V. These dielectrics are an ideal choice for automotive applications due to their ability to withstand high-voltage conditions and the advancement of features such as Automatic Driver Assistance Systems (ADAS), infotainment systems, and improved battery storage capabilities.

Incentives and discounts are driving the increasing demand for electric vehicles, along with the development of consumer electronics such as augmented reality and virtual reality, which is propelling MLCC demand

In 2022, China emerged as the frontrunner, capturing the largest market share of 24.79%, followed closely by South Korea with 20.31% and Japan with 12.27% in terms of value.

The Chinese consumer electronics manufacturing industry is one of the most prominent globally. It is anticipated that the Chinese consumer electronics market will experience rapid growth in the future, driven by the introduction of 5G networks, the proliferation of smart homes, augmented and virtual reality technologies, and the continuous evolution of consumer electronic devices with improved features. As a result, the need for installed multi-layer ceramic capacitors MLCCs of surface mount type with 0201 case sizes with low capacitance of less than 100uF is expected to increase accordingly. Incentives and discounts drive the increasing demand for electric vehicles, and the development of consumer electronics such as augmented reality and virtual reality is propelling the MLCC demand.

The automotive industry is undergoing a period of rapid technological development, which is leading to an increase in the demand for MLCCs. Generally, an engine-driven vehicle without an automated driving feature requires approximately 3,000 MLCCs, while an electric vehicle requires between 8,000 and 10,000 MLCCs. The automotive sector is a major contributor to India's economic growth and can be seen as a benchmark for the current situation. Additionally, Indian government regulations, incentives, discounts, and awareness about e-mobility are driving consumers toward the purchase of electric vehicles, driving the demand for MLCCs.

### Asia-Pacific MLCC Market Trends

Development of the E-commerce industry is expected to propel the market

The light commercial vehicle production was expected to grow from 5.25 million units in 2019 to 5.23 million units in 2022.

The online commerce and logistics sectors support the market for light commercial vehicles. Owing to increased access to mobile phones and the Internet, there has been an increase in online retail sales and e-commerce. Commercial vehicle sales are expected to increase to improve the timely delivery of goods to clients.

As a result of COVID-19 online sales, the user base and income of the global e-commerce market greatly expanded. The highest increase in online shopping by individuals in 2020 was caused by the pandemic, which forced individuals to shop online. However, the Asia-Pacific light commercial vehicles witnessed a YoY drop of 11.17% in production in 2020 because of stringent restrictions on e-commerce and travel imposed by the local authorities.

The production of light commercial vehicles is recovering steadily as governments are taking the initiative to electrify these vehicles. Major regional players are collaborating to develop and manufacture electric trucks.

The rising adoption of electric vehicles is expected to enhance the demand

The passenger vehicle production was expected to grow from 40.65 million units in 2019 to 42.32 million units in 2022, registering a CAGR of 1.35% during the period.

The passenger car sector witnessed a drop of 11.88% YoY production in 2020. The pandemic and the Russia-Ukraine war heavily impacted supply chains across the globe, slowing down the production of passenger cars and forcing manufacturers to close production lines temporarily. Economic challenges such as inflation affected demand, as people are postponing large purchases such as cars. However, the market witnessed a slow but steady recovery, with a YoY production growth of 10.83% in 2022.

The demand for fuel-based passenger vehicles is slowly reducing due to changing government policies concerning CO2 emissions. Governments across the regions are focusing on reducing greenhouse gas emissions by 2030 and achieving net-zero emissions by 2050. To meet this demand, companies and governments are focusing on introducing hybrid or electric cars and installing charging infrastructures directly at public outlets or indirectly through subsidies for private car charging stations in homes and workplaces. Asia-Pacific countries are exhibiting higher growth in the sales of electric vehicles compared to their Western competitors. In the last decade, there has been a significant increase in BEV sales in this region.

Owing to the aforementioned factors and developments, the adoption of predictive technologies is increasing in the production of passenger vehicles, and such positive trends are expected to enhance the growth of the MLCCs used in these vehicles during

the forecast period.

### Asia-Pacific MLCC Industry Overview

The Asia-Pacific MLCC Market is fairly consolidated, with the top five companies occupying 72.07%. The major players in this market are Murata Manufacturing Co., Ltd, Samsung Electro-Mechanics, Taiyo Yuden Co., Ltd, TDK Corporation and Walsin Technology Corporation (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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