

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

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Abstracts

The China MLCC Market size is estimated at 3.41 billion USD in 2024, and is expected to reach 9.27 billion USD by 2029, growing at a CAGR of 22.12% during the forecast period (2024-2029).

China's thriving MLCC market through case size dynamics and market growth projections

In China's dynamic MLCC market, the 0 201 case size segment held a substantial 41.33% of the volume market share in 2022, and it's poised to generate a revenue of USD 3.51 billion by 2029. These miniature MLCCs are pivotal components, finding extensive use in small electronic devices like wearables, medical equipment, and IoT devices. Their remarkable performance within densely populated PCB layouts ensures seamless integration without compromising efficiency. As China gears up to dominate the global 5G market, the demand for 0 201 MLCCs is expected to soar, especially in 5G-enabled smartphones, where compact form factors are crucial.

The 0 402 case size segment, representing 23.82% of the market share by volume in 2022, is projected to yield USD 2.06 billion by 2029. These compact components, measuring 0.040 inches in length and 0.020 inches in width, are the go-to for consumer electronics, including smartphones, tablets, laptops, and gaming consoles.

China's 0 603 case size segment, with a 18.78% share of the volume market in 2022, is expected to generate USD 1.71 billion by 2029. These MLCCs, measuring 0.06 inches in length and 0.03 inches in width, are convenient to work with manually, providing

advantages in ease of identification and hand soldering.

The 1 210 case size segment, accounting for 16.07% of the volume market share in 2022 and projecting USD 956.60 million by 2029, offers precise measurements that are crucial for optimal integration on circuit boards and electronic devices. The growth in China's electric vehicle market and advanced smartphone technologies are driving the need for these MLCCs, ensuring dependable performance and supporting modern functionalities.

China MLCC Market Trends

The development of the e-commerce industry is expected to propel the demand for light commercial vehicles

Pickups, a small light-vehicle segment in the Chinese market, are poised for robust growth as more governments relax rules over their use. The total production of light commercial vehicles in 2019 was 2 million units, and the sales volume of light trucks in the country reached 1.9 million units, achieving continuous growth.

The sales of light trucks have grown steadily in the past two years. Due to the country canceling the product category of low-speed trucks and the rapid development of domestic e-commerce express logistics and cold chain transportation, the market demand for light trucks continued to increase, with a Y-o-Y growth of 7.44% in 2020. Chinese light truck manufacturers designed their related products accordingly to cope with the complex usage environment.

In 2022, China led in terms of overall electric LCV sales, with over 130 million units sold and nearly 15% of LCVs sold being electric. Subsidies for battery electric and fuel cell trucks and vocational vehicles (including LCVs) have decreased in recent years, but zero-emission commercial truck sales have been growing since 2020, even as subsidies per vehicle have declined, indicating the increasing commercial competitiveness of electric trucks. With the continuous development of the country's express delivery and logistics industry, the overall light truck sales demand is expected to maintain a growth trend in the medium and long term.

Rapid urbanization and advanced vehicle technology are expected to increase the demand for passenger vehicles

China has one of the fastest-growing auto industries and accounts for a major presence of original equipment manufacturers (OEMs) globally. Passenger cars were a key segment of the Chinese automotive industry, producing 21.38 million units in 2019. Factors such as increasing disposable income, rapid urbanization, demand for new cars from lower-tier cities, and low vehicle costs are driving the growth of passenger vehicles in China.

More electric cars were sold in China in 2021 (3.3 million) than in the world in 2020 (3.0 million). China's fleet of electric cars remained the world's largest at 7.8 million in 2021, which was more than double the stock of 2019 before the COVID-19 pandemic. Over 2.7 million BEVs were sold in China in 2021, accounting for 82% of new electric car sales.

Electric cars accounted for 16% of domestic car sales in 2021, up from 5% in 2020, and reached a monthly share of 20% in December 2021, reflecting a much quicker recovery of the EV market relative to conventional cars. This impressive growth came alongside government efforts to accelerate decarbonization in the new 14th Five-Year Plan (FYP) (2021-2025), continuing the trend of progressively strengthening policy support for EV markets in the past few FYP periods. The current FYP includes medium-term objectives in transport, such as reaching an annual average of 20% market share for electric car sales in 2025.

Stringent emission norms, fluctuating fuel prices, and the growing demand from customers for eco-friendly transportation caused the production of passenger vehicles to witness a Y-o-Y growth of 11.15% in 2022, and this growth is expected to continue in the future.

China MLCC Industry Overview

The China MLCC Market is fairly consolidated, with the top five companies occupying 69.21%. 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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Contents

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Price Trend

4.1.1 Copper Price Trend

4.1.2 Nickel Price Trend

4.1.3 Silver Price Trend

4.2 Consumer Electronics Sales

4.2.1 Air Conditioner Sales

4.2.2 Desktop PC's Sales

4.2.3 Gaming Console Sales

4.2.4 Laptops Sales

4.2.5 Refrigerator Sales

4.2.6 Smartphones Sales

4.2.7 Storage Unit Sales

4.2.8 Tablets Sales

4.2.9 Television Sales

4.3 Automotive Production

4.3.1 Buses and Coaches Production

4.3.2 Heavy Trucks Production

4.3.3 Light Commercial Vehicles Production

4.3.4 Passenger Vehicles Production

4.3.5 Total Motor Production

4.4 Ev Production

4.4.1 BEV (Battery Electric Vehicle) Production

4.4.2 PHEV (Plug-in Hybrid Electric Vehicle) Production

4.5 Industrial Automation Sales

4.5.1 Industrial Robots Sales

- 4.5.2 Service Robots Sales
- 4.6 Regulatory Framework
- 4.7 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (INCLUDES MARKET SIZE IN VALUE IN USD AND VOLUME, FORECASTS UP TO 2029 AND ANALYSIS OF GROWTH PROSPECTS)

- 5.1 Dielectric Type
 - 5.1.1 Class
 - 5.1.2 Class
- 5.2 Case Size
 - 5.2.1 0
 - 5.2.2 0
 - 5.2.3 0
 - 5.2.4 1
 - 5.2.5 1
 - 5.2.6 Others
- 5.3 Voltage
 - 5.3.1 500V to 1000V
 - 5.3.2 Less than 500V
 - 5.3.3 More than 1000V
- 5.4 Capacitance
 - 5.4.1 100 μ F to 1000 μ F
 - 5.4.2 Less than 100 μ F
 - 5.4.3 More than 1000 μ F
- 5.5 Mlcc Mounting Type
 - 5.5.1 Metal Cap
 - 5.5.2 Radial Lead
 - 5.5.3 Surface Mount
- 5.6 End User
 - 5.6.1 Aerospace and Defence
 - 5.6.2 Automotive
 - 5.6.3 Consumer Electronics
 - 5.6.4 Industrial
 - 5.6.5 Medical Devices
 - 5.6.6 Power and Utilities
 - 5.6.7 Telecommunication
 - 5.6.8 Others

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

6.3 Company Landscape

6.4 Company Profiles

6.4.1 Kyocera AVX Components Corporation (Kyocera Corporation)

6.4.2 Maruwa Co Ltd

6.4.3 Murata Manufacturing Co., Ltd

6.4.4 Nippon Chemi-Con Corporation

6.4.5 Samsung Electro-Mechanics

6.4.6 Samwha Capacitor Group

6.4.7 Taiyo Yuden Co., Ltd

6.4.8 TDK Corporation

6.4.9 Vishay Intertechnology Inc.

6.4.10 Walsin Technology Corporation

6.4.11 Würth Elektronik GmbH & Co. KG

6.4.12 Yageo Corporation

7 KEY STRATEGIC QUESTIONS FOR MLCC CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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