

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

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## Abstracts

The Europe MLCC Market size is estimated at 3.73 billion USD in 2024, and is expected to reach 10.08 billion USD by 2029, growing at a CAGR of 21.99% during the forecast period (2024-2029).

5G base station rollouts and the growing military spending in the region are driving the need for MLCCs

The 0 201 case size segment emerged as the frontrunner, capturing the largest market share of 34.55%, followed by the 0 402 case size segment with 19.57% and the 0 603 case size segment with 14.10% in terms of volume in 2022.

The case size of 0 402 is among the most compact available, thus increasing the component density of the circuit board. As the European aerospace and defense sector invests in advanced technologies and systems, such as communication equipment and unmanned aerial vehicles (UAVs), the need for 0 402 MLCCs with X7R dielectric with a mid capacitance of 100uF-1000uF is expected to grow due to their essential role in sustaining dependable and efficient power performance. Medical device designers are currently working to develop innovative device designs to reduce the size of ICDs and pacemakers further. These devices must be as small as possible, as they are both contained within the human body. The development of lead-free pacemakers is currently underway, and they are estimated to be approximately one-tenth the size of a traditional pacemaker. Therefore, further miniaturization of the electrical components used in these devices, including capacitors, may be necessary.

The demand for 0 603 MLCCs is being driven by the telecommunications industry. The European telecommunications sector is focusing on rapid 5G base station deployment, thus increasing the demand for 0 603 case size MLCCs with X5R dielectric.

The increasing usage of consumer electronics like 5G-enabled smartphones and new technological advancements like AR and VR are driving the MLCC demand

Germany emerged as the frontrunner, capturing the largest market share of 25.07%, followed by the United Kingdom, with 14.99%, in terms of volume in 2022.

The United Kingdom's consumer electronics manufacturing sector is gaining traction. Consumer electronics markets in countries like the United Kingdom are expected to grow rapidly in the coming years. 5G networks, smart homes, AR and VR technologies, and the constant evolution of consumer electronics devices with enhanced features may also contribute to this growth. As a result, the demand for installed multi-layer ceramic capacitors (MLCCs) of the surface-mount type of 0 201 case size, with a low capacitance below 100uF, is expected to grow.

The German automotive sector is one of the biggest contributors to the country's economic growth. As a result, the demand for X7R MLCCs is on the rise. An engine-powered vehicle without an automatic driving feature typically needs around 3,000 MLCCs, whereas an electric vehicle (EV) typically requires 8,000-10,000 MLCCs. The current state of the automotive sector can be seen in the rapid technological development taking place in Germany. In addition, the German government's regulations, incentives, and discounts, as well as the growing awareness of e-mobility, are driving consumers to purchase EVs.

## Europe MLCC Market Trends

Stringent government regulations increase the penetration of electric LCVs

Light commercial vehicles (LCVs) production exhibited a mixed performance between 2019 and 2022. Starting at 2.52 million units in 2019, it experienced a slight decline in 2020 to 2.11 million units. However, there was a rebound in 2021 with a production volume of 2.18 million units, followed by stability at 2.14 million units in 2022, indicating a CAGR of around 4.6% over the four years, reflecting the challenging and volatile

nature of the market.

In the years leading up to 2019, the industry witnessed the highest CAGR in LCV production. However, subsequent years were marked by disruptions and uncertainties, including the COVID-19 pandemic, which significantly impacted the overall automotive industry. Supply chain disruptions and reduced consumer demand contributed to the decline in production. Nonetheless, the industry demonstrated resilience by maintaining a certain level of production.

The approval of new CO<sub>2</sub> emissions reduction targets for passenger cars and light commercial vehicles by the European Parliament as part of the "Fit for 55" package will have a substantial impact on the automotive industry, including the market for MLCCs. As the industry moves towards zero CO<sub>2</sub> emissions and increased adoption of electric vehicles, the demand for MLCCs is expected to rise.

The installation of OBFCMs, as mandated by the European Commission, will further drive the demand for MLCCs. These components enable accurate measurement, data processing, and communication within vehicle systems, supporting monitoring of CO<sub>2</sub> emissions and energy consumption. Adapting the ZLEV incentive mechanism to reflect sales trends will incentivize the production and purchase of zero-emission vehicles, increasing demand for MLCCs.

The increased adoption of OBFCM devices in Europe also increased the production of passenger vehicles

In Europe, the production of passenger vehicles witnessed a decline. Starting at a production volume of 18.70 million units in 2019, it decreased to 13.72 million units in 2022, with a CAGR of approximately -8.7% over the four years, mirroring the difficult market conditions and disruptions encountered by the European automotive sector.

This decline in production can be attributed to various factors, including the temporary closure of manufacturing facilities, reduced consumer purchasing power, and overall market uncertainty caused by the pandemic. However, it is important to note that the European automotive sector has shown resilience and adaptability in the face of adversity.

With the implementation of the light-duty vehicle CO<sub>2</sub> regulation in 2019, there was a

renewed focus on reducing emissions and addressing climate change. This regulation emphasizes the need for accurate monitoring of on-road fuel and electric energy consumption, leading to the installation of onboard fuel and energy consumption monitoring devices (OBFCMs) in new vehicles. This regulatory framework creates opportunities for businesses operating in the European MLCC market. MLCCs are essential electronic components used in various applications, including automotive electronics. As vehicles become more sophisticated with the integration of OBFCMs and other monitoring devices, the demand for MLCCs is expected to increase. These components play a crucial role in enabling accurate measurement, data processing, and communication within the vehicle's systems.

As the industry works toward the integration of advanced technologies, such as OBFCMs, it will play a crucial role in achieving real-world CO<sub>2</sub> reductions and ensuring vehicles perform as expected in real-world driving conditions.

## Europe MLCC Industry Overview

The Europe MLCC Market is moderately consolidated, with the top five companies occupying 51.04%. The major players in this market are Kyocera AVX Components Corporation (Kyocera Corporation), Murata Manufacturing Co., Ltd, Samsung Electro-Mechanics, Taiyo Yuden Co., Ltd and Yageo Corporation (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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