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

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Abstracts

The Germany MLCC Market size is estimated at 1.39 billion USD in 2024, and is expected to reach 4.13 billion USD by 2029, growing at a CAGR of 24.35% during the forecast period (2024-2029).

The increasing utilization of wearable medical devices and the rising adoption of consumer electronics like PCs and 5G-enabled smartphones driving MLCC demand

The 0 201 case size segment emerged as the frontrunner, capturing the largest market share of 36.64%, followed by the 0 402 case size segment, with a 14.94% share, and the 0 603 case size segment, with 13.84%, 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. German consumers are increasingly using wearable medical devices like fitness trackers and smartwatches due to increased interest in health and wellbeing. For instance, in Germany, 74,485 passed away due to chronic ischaemic heart disease in 2021. The need for 0 402 MLCCs with X7R dielectric with low capacitance of less than 100uF is expected to grow in medical devices in cardiovascular devices like pacemakers and defibrillators due to their essential role in sustaining dependable and efficient power performance.

0 603 compact MLCCs are widely used in consumer electronic industries such as smartphones, tablets, laptop computers, digital cameras, and gaming consoles. They are popular due to their compact size and high capacitance, as well as their smooth integration. The demand for 0 603 MLCCs is being driven by Germany’s consumer

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electronics industry. Consumer electronics like PCs, laptops, air conditioners, and refrigerators require miniaturized components like 0 603 MLCCs with low capacitance of 100uF.

Germany MLCC Market Trends

Electric light commercial vehicles are expected to have a positive impact on the market

Light commercial vehicles represent an important part of the commercial vehicle market in Germany. As of 2019, roughly 28.35 thousand light commercial vehicles were manufactured in the country.

The COVID-19 pandemic resulted in lockdowns and other restrictions that caused supply chain issues in the light commercial vehicle industry that had never been seen before. The pandemic caused unprecedented levels and types of mobility and travel limitations in the country. End-user industries that transport goods, such as infrastructure, transportation, and logistics, were completely shut down, posing new challenges for the manufacturing and freight industries.

Electric light commercial vehicles (eLCVs), the centerpiece of urban transport, are the next step in Germany’s endeavors to combat traffic-related emissions. eLCVs have struggled to build significant market demand so far. In 2018, less than 2% of all newly registered LCVs in Germany were all-electric vehicles. Diesel engines still dominate this market.

The government has prioritized the development of batteries, cars, charging stations, digital mobility apps, ICT, smart mobility, and energy services in order to speed up the adoption of electric vehicles in the next years. The demand for electric light commercial vehicles is anticipated to increase due to the growth of e-commerce and logistical activities.

Increased adoption of ADAS is propelling the demand for passenger vehicles

Germany is the second most populous country in Europe and has the largest economy in the region. The production of passenger vehicles witnessed a decline from 2019 to

2022. The production volume of 4.6 million units in 2019 decreased to 3.48 million units in 2022. The observed CAGR of approximately -7.06% over the four-year period mirrors the difficult market conditions and disruptions encountered by the European automotive industry.

During the pandemic-resultant lockdown, production was stopped at some sites, which happened when companies were already struggling to shift from diesel- and gasoline-powered cars toward "green" electric vehicles. This hit the car industry, the main driver of Germany's export-based economy.

One of the long-term targets of the German government is a fossil fuel exit and an increase in electric vehicles. German electric car sales increased annually until 2022. While the prices of the vehicles themselves and the rising cost of living in the country are undoubtedly contributing factors to these numbers, another is the still-developing infrastructure for charging electric cars. Discontinuation of subsidies for plug-in hybrids is also slowing the electric vehicles market.

With advancements in AI and IoT and ever-growing dependence, the demand for automobiles is no longer limited to electric vehicles. ADAS software will become the driving factor for the future of passenger vehicles, thereby increasing the demand for MLCCs. Several companies are entering joint ventures and partnerships to launch newer products to have an edge over their competitors. In January 2022, Bosch and Cariad, Volkswagen's subsidiary, formed a partnership to develop new technology for automated vehicles and advanced driver-aid systems.

Germany MLCC Industry Overview

The Germany MLCC Market is moderately consolidated, with the top five companies occupying 43.45%. 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).

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