

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

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## Abstracts

The High Voltage MLCC Market size is estimated at 4.07 billion USD in 2024, and is expected to reach 10.87 billion USD by 2029, growing at a CAGR of 21.68% during the forecast period (2024-2029).

The increasing popularity of portable and connected devices is contributing to achieving compact designs without compromising on performance

The 0 201 case size segment emerged as the frontrunner, capturing the largest market share of 24.04%, followed by the 0 402 case size segment with 15.81% and the 1 206 case size segment with 15.66% in terms of volume in 2022.

The ongoing trend of miniaturization, coupled with the need for higher component density, drives the demand for these components. The increasing popularity of portable and connected devices further contributes to the demand for 0 201 MLCC components, as they enable manufacturers to achieve compact designs without compromising on performance.

The usage of 0 1005 MLCCs spans diverse applications. The demand for MLCCs is on the rise in the aerospace and defense sectors, especially for applications such as military aircraft and electronic warfare defense systems like UAVs. The increasing national security concerns and border threats are driving the demand for manned and unmanned aerial vehicles in the defense sector. Governments are taking several measures to boost domestic manufacturing and growth across industries.

The compact 0 402 case size is widely adopted as a form factor for surface-mount ceramic capacitors. The automotive industry relies on 0 402 MLCCs for various applications, including engine control units, infotainment systems, ADAS, and lighting control. These capacitors provide reliable performance in harsh automotive environments. The number of electric vehicles in Germany and this expansion in the charging infrastructure may drive the demand for key components like MLCCs in EV charging stations. As the number of charging stations increases, there will likely be a proportional surge in the demand for MLCCs to ensure the smooth operation and reliability of the charging infrastructure.

Availability of affordable and energy-efficient robots is surging in Asia-Pacific

Asia-Pacific captured the largest market share of 43.00%, followed by North America, with 23.57%, and Europe, with 22.80%, in terms of volume in 2022.

Asia-Pacific is at the forefront of rapid technology adoption and digital transformation efforts. China is the world's largest market for industrial robots, largely due to government policies promoting the modernization of the country's manufacturing sector. Policy initiatives include the National High-Tech R&D program, Made in China 2025, and the Robotic Industry Development Program, which require more investments in automation and robotics.

The US aerospace and defense sector is one of the largest in terms of infrastructure and manufacturing activities. The market is primarily driven by investments in the aerospace and defense sector and supported by the rising demand for the sector's products by commercial and military end users. Space exploration is expected to evolve and grow due to declining launch costs and technological advancements. Such factors are expected to bolster the prospects of the MLCCs during the forecast period.

## Global High Voltage MLCC Market Trends

Rise in technological advancements in vehicles is expected to boost passenger vehicles

Passenger cars are among the most common modes of transportation in developed countries. MLCCs are essential components for the proper and stable operation of the various electrical and electronic circuits utilized in cars. A large number of components are used, and even the typical engine-driven vehicle that does not have an automated

driving feature uses approximately 3,000 MLCCs. MLCCs are used in passenger vehicles for airbags, anti-lock brake systems, tire pressures, light sensors, lamp/LED drivers, car alarms, dashboard systems, fuel pumps, water pumps, gearbox sensors, temperature sensors, etc.

Passenger vehicle shipments are expected to grow from 61.59 million units in 2022 to 110.5 million units in 2030, registering a CAGR of 7.58% during the forecast period (2023-2030).

Passenger vehicle sales are increasing due to the rising standard of living in emerging countries and the surge in the middle-income group population. Consumers are also inclined toward these vehicles owing to the availability of economic options in these vehicles. The rise in technological advancements, ADAS, and connected vehicles is propelling the sales of passenger vehicles. The demand for fuel-based passenger vehicles is slowly reducing as a result of changing government policies concerning CO<sub>2</sub> emissions. Governments across the regions are focusing on reducing greenhouse gas (GHG) emissions by 2030 and achieving net-zero emissions by 2050. Companies are focusing on introducing hybrid and electric cars to cater to such demands.

Increasing awareness of electric bikes is expected to surge the demand for MLCCs

One of the primary applications of MLCC in two-wheeler vehicles is power filtering and decoupling. MLCCs are also used to suppress EMI (electromagnetic interference) in two-wheeler vehicles. They are placed near the electronic circuits to prevent interference from other electronic components, such as spark plugs and alternators. Overall, MLCCs play a crucial role in ensuring the proper functioning of electronic systems in two-wheeler vehicles, and their use is essential for the reliable and efficient operation of the vehicle.

The two-wheeler vehicle shipments are expected to grow from 54.85 million units in 2022 to 81.05 million units in 2030, registering a CAGR of 5% during the forecast period (2023-2030). The COVID-19 pandemic halted the market through a series of waves. However, the demand for two-wheelers increased in 2021 for recreational purposes and proved more resilient. With affordability being key in low- and medium-income regions, two-wheelers have a better market share in terms of numbers than four-wheelers.

Technology developments, vehicle safety advancements, the introduction of driver-

assist systems in motorcycles, and rising logistics in the retail and e-commerce sectors have all played a vital role in propelling the production and sales of two-wheelers. Governments of various countries are taking initiatives to increase awareness of electric bikes, which helps reduce the carbon footprint. For instance, in 2021, India extended its primary EV demand stimulating FAME II policy to 2024. It also increased subsidies for electric two-wheelers and made budgetary commitments for battery swapping policies and developing EV manufacturing and battery supply capacity.

## High Voltage MLCC Industry Overview

The High Voltage MLCC Market is fairly consolidated, with the top five companies occupying 66.12%. 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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