

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

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Abstracts

The North America MLCC Market size is estimated at 4.11 billion USD in 2024, and is expected to reach 11 billion USD by 2029, growing at a CAGR of 21.78% during the forecast period (2024-2029).

Increasing awareness among consumers about the emergence of novel technologies is among the primary growth stimulants of 0 201 MLCCs

Case size 0 201 holds the largest market share of 32.73% in terms of volume and generated a revenue of USD 644.90 million in 2022. The case size 0 603 is the fastest-growing segment, with a CAGR of 29.10% (2022-2029).

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. North America is home to several laptop manufacturers and multinational companies that have a significant presence in the market. The increased need for video conferencing, virtual collaboration tools, and online education has accelerated laptop sales.

The usage of 0 1005 MLCCs spans diverse applications, particularly in compact electronic devices such as smartphones, wearables, and IoT devices, enabling manufacturers to achieve sleek and compact designs without compromising

performance. The number of smartphone users in Canada is increasing every year as consumers spend more money on devices, including upgrades to their existing phones.

The 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, and ADAS. These capacitors provide reliable performance in harsh automotive environments. The demand for autonomous vehicles is rising in North America due to the increased focus on automotive safety, the rise in demand for comfort features in a vehicle, and a growing desire of vehicle owners to reduce the amount of human error in case of accidents.

Favorable government incentives and subsidies are expected to increase the demand for EVs in the United States

The United States captured the largest market share of 56.69%, followed closely by others with 43.31% in terms of volume in 2022.

The United States is one of the most significant markets for MLCC. The country is one of the pioneers of advanced automotive, especially electric vehicles and autonomous technology. Most major companies in end-user applications of MLCCs are based in the United States, making the country a major target for MLCC manufacturers. As most of these companies are advancing their product offerings, the deployment of the number of MLCCs is increasing. This is likely to make the United States one of the significant markets for MLCC over the forecast period.

Canada's vision to combat environmental concerns is a major factor in the development of the electric vehicles and energy storage systems market, which is further creating an opportunity for the vendors in the market studied. Canada signed a new international alliance to switch to electric cars. The country also offers a massive market for high-end electronic devices, mainly due to the high adoption rate of digital technologies.

According to the Entertainment Software Association of Canada (ESAC), the gaming industry in Canada is booming, increasing the penetration of high-end devices in the country. These key factors are fueling the demand for MLCCs.

North America MLCC Market Trends

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

The 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 worldwide. The end-user industries that transport goods, such as infrastructure, transportation, and logistics, have completely shut down, posing new challenges for the manufacturing and freight industries. The light commercial vehicle (LCV) market is driven by the growth of North America's e-commerce sector and logistics. As the number of people with internet access and access to smartphones increases, so does the number of online retail outlets. As a result, the demand for light commercial vehicles is expected to increase, facilitating the timely delivery of products to customers.

Canada established GHG emission caps for new light-duty vehicles by Passenger Automobile and Light Truck Greenhouse Gas Emission Regulations. The expansion of the logistics and e-commerce sectors is expected to increase the demand for LCVs. Due to rising urbanization, the market for light commercial vehicles (LCVs) is expanding with the development of new retail and e-commerce platforms that require effective logistics. The rising popularity of BEVs, the introduction of new EV models, and the development of charging infrastructure are the primary factors driving the market's growth.

The growing awareness of driver assistance systems is creating demand

The passenger car market in North America experienced tremendous growth, with a production of 2.97 million units in 2019. The United States is the third-largest producer of electric vehicles in the world. The shift to EVs has continued at its current rate, owing to government initiatives to promote EV growth.

The COVID-19 pandemic hindered the growth of the market, as there was a disruption in the production of vehicles due to the collapse of supply chains across the world. However, the market is expected to witness significant growth during the forecast period due to increasing awareness about the positive environmental impacts of electric vehicles and various initiatives by governments of different countries.

Several OEMs became interested in increasing their production capacity to meet the

growing demand for electric vehicles. The government policy banning ICE engines helped boost the sales of electric vehicles. The increase in the price of gasoline and diesel due to various global reasons has made it easy for EV companies to boost their sales. Electric car sales in the United States, the third largest market, increased by 55% in 2022, reaching a sales share of 8%.

In May 2019, the federal government launched the Incentives for Zero-Emission Vehicles (iZEV) Program. The incentive-based initiative aims to help Canadians and Canadian businesses purchase or lease zero-emission vehicles. In 2022, the Canadian federal government announced a sales mandate for zero-emission vehicles. With the aim that at least 20% of new passenger vehicles sold in Canada must be zero-emission vehicles by 2026. That will increase to 60% by 2030 and jump to 100% by 2035.

North America MLCC Industry Overview

The North America MLCC Market is moderately consolidated, with the top five companies occupying 41.61%. 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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