

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

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Abstracts

The Smartphone MLCC Market size is estimated at 5.35 billion USD in 2024, and is expected to reach 11.58 billion USD by 2029, growing at a CAGR of 16.72% during the forecast period (2024-2029).

The smartphone MLCC market is being propelled by compact solutions provided by various case sizes

The utilization of compact MLCCs is strategically targeted toward the intricate designs of space-constrained smartphones. The incorporation of compact 0 201 MLCCs is specifically tailored to address the intricate design challenges presented by space-constrained smartphones.

The proliferation of 5G-enabled devices, ranging from laptops to specialized industry tools, has a direct and consequential impact on the demand for MLCCs. Notably, 1 201 MLCCs, renowned for their compact form factor and compatibility with diminutive electronic devices, are projected to record a surge in demand. As 5G technology transcends the realm of smartphones, manufacturers engaging in the production of laptops, drones, and an array of other cutting-edge gadgets seek reliable and efficient MLCC components.

Building upon this continuum, the 0 402 MLCCs, slightly larger than their 0 201 counterparts, effectively strike an optimal balance between dimensions and capacitance. The 0 603 MLCCs introduce a facet of versatility by catering adeptly to applications necessitating moderate levels of capacitance.

An underlying trend of notable significance lies within the realm of the smartphone MLCC market, i.e., the meteoric rise in the demand for the 0402 case size. This surge is attributed to the rise of 5G technology, which fuels the demand for these capacitors.

As consumers enthusiastically adopt wireless home broadband access, the requisition for 5G routers and associated devices experiences a corresponding surge, thereby augmenting the demand landscape for these critical MLCCs.

Regional dynamics are shaping the smartphone MLCC market

The smartphone MLCC market is poised for substantial growth across various regions, reflecting the transformative trends and technological advancements driving the demand.

Asia-Pacific is witnessing significant changes in the smartphone MLCC market due to rapid technological advancements and digital connectivity growth. With over 3 billion projected smartphone connections by 2030 and a 94% adoption rate, the demand for MLCCs is substantial. 5G technology and IoT expansion drive the rising demand, positioning the region as a key player in the global tech landscape.

Europe's smartphone market is evolving with the rise of 5G technology, impacting MLCC demand. A 70% 5G network coverage by 2025 is anticipated to drive the need for advanced components. IoT growth and changing smartphone adoption rates across markets offer diverse opportunities for MLCC manufacturers, emphasizing their role in expansion.

Driven by rapid 5G evolution, the North American smartphone MLCC market is in a transformative phase. Ambitious 5G deployment plans in the United States and Canada boost the demand for enhanced connectivity and signal processing, fueling MLCC demand. The region's strong mobile technology contribution to GDP underscores the critical role of MLCCs in technological advancement.

The Rest of the World, including the Middle East, North Africa, and Sub-Saharan Africa, presents a dynamic landscape for the smartphone MLCC market. Mobile technologies drive economic growth and demand for MLCCs in MENA, while Sub-Saharan Africa's mobile revolution spurs smartphone adoption, impacting MLCC requirements. Despite

challenges, the region's adoption of technology positions it for sustained growth in the smartphone MLCC market.

Global Smartphone MLCC Market Trends

The demand for 5G smartphones is expected to decrease the sales of 4G smartphones

MLCCs are important for electronic components in smartphones as they filter and stabilize power supply to several components, such as processors and memory, reduce noise and interference, and improve signal quality. A high-end smartphone uses 800-1,000 MLCCs, while low or mid-range devices require 300-600 per unit.

The sales of 4G smartphones witnessed a Y-o-Y drop of 36.37% in 2020. The supply and demand imbalance in the smartphone market was affected by the COVID-19 pandemic. Weakened development of next-generation products and delayed shipments of existing products have adversely hit the smartphone manufacturing sector since China is the global manufacturing center for most of these components and devices. The surge in mobile internet usage in mainland China, driven by the increasing adoption of smartphones and the widespread availability of 4G, has propelled the country's advancement up the digital-society value chain. The sales witnessed a further decline of 12% in 2022, from 790.24 million units in 2021 to 691.95 million units in 2022. The introduction of 5G technology is driving consumers to upgrade their smartphones so they can benefit from enhanced performance and quicker speeds.

4G smartphones, although not as advanced as 5G devices, still require MLCCs that can handle the demands of high-speed data transmission and multimedia applications. MLCC requirements may be slightly lower compared to 5G smartphones, but MLCCs remain critical for power management, signal conditioning, and noise reduction in 4G devices.

The growing integration of AR and VR technology is expected to propel the sales of 5G smartphones

5G smartphones are at the forefront of technological advancements, offering faster data speeds, lower latency, and enhanced network capacity. These smartphones require MLCCs with higher capacitance to support the increased data throughput and power demands associated with 5G connectivity.

The integration of MLCCs enables efficient power delivery, noise suppression, and voltage stabilization, ensuring optimal performance of 5G smartphones. Approximately 600-1,400 MLCCs were used in each 5G smartphone during 2019-2022. The miniaturization of MLCCs is helping manufacturers in developing a high-performing, multipurpose, and easy-to-use 5G smartphone with the ideal size.

The sales of 5G smartphones rose by 25% in 2022, from 604.63 million units in 2021 to 757.50 million units in 2022. The demand for 5G smartphones is expected to increase as consumers switch and upgrade to smartphones with the latest technology. The popularity of 5G devices is on the rise, prompting chipmakers to encourage smartphone manufacturers to integrate 5G chips into their new product range.

The advent of 5G technology allows smartphone manufacturers to improve the user experience. With lower latency and faster network speeds, 5G enables new possibilities, such as virtual reality (VR) and augmented reality (AR), for enhanced gaming experiences. As the number of functions installed in a smartphone increases, the number of installed MLCCs is also expected to increase proportionally.

Smartphone MLCC Industry Overview

The Smartphone MLCC Market is moderately consolidated, with the top five companies occupying 59.43%. 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:

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