

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

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Abstracts

The United States MLCC Market size is estimated at 2.55 billion USD in 2024, and is expected to reach 8 billion USD by 2029, growing at a CAGR of 25.69% during the forecast period (2024-2029).

Increasing awareness among consumers about the emergence of novel technologies among the primary growth drivers of 0201 MLCCs

The case size 0201 segment emerged as the frontrunner, capturing the largest market share of 22.29%, followed by 0402, with 22.22%, and 0603, with 21.94%, 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 0201 MLCC components, enabling manufacturers to achieve compact designs without compromising performance. The United States is home to several prominent laptop manufacturers and multinational companies with 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 01005 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. Smartphones are in high demand in the United States due to the rapid

adoption of the 5G network.

The 0402 case type is widely adopted as a form factor for surface-mount ceramic capacitors. The automotive industry relies on 0402 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.

United States MLCC Market Trends

The development of third-party logistic providers may propel the demand for light commercial vehicles

The market for light commercial vehicles (LCVs) is primarily driven by the e-commerce and logistics industries. As more people have access to the Internet and smartphones, online retail sales and e-commerce have been increasing. Purchases of LCVs are anticipated to increase, thereby facilitating quick delivery of items to customers. The country produced 8.03 million units in 2019.

The COVID-19 pandemic and the Russia-Ukraine War resulted in unprecedented levels and types of mobility and transportation restrictions, resulting in a 17.17% Y-o-Y drop in production. Lockdowns and other restrictions caused previously unheard-of problems in the commercial vehicle industry's supply chain. Tightening emissions regulations, vehicle safety improvements, driver-assist systems in cars, and the explosive growth of logistics in the retail and e-commerce sectors have all fueled demand for new and innovative commercial vehicles.

Third-party logistic providers, such as FedEx, UPS, and DHL, use a variety of LCVs to transport products to the nearest product delivery station. These businesses have a larger fleet of LCVs because smaller LCVs use less fuel than heavy commercial vehicles when commuting within a city. To combat climate change and city pollution, big logistics operators have started replacing their fleets of combustion engines with electric or low-emission vehicles. For instance, in December 2021, FedEx announced a global target to make 50% of all newly purchased vehicles electric by 2025, rising to 100% for the new fleet by 2030. By 2040, FedEx wants to achieve global carbon neutrality

through the electrification of pickups and delivery vehicles as a significant investment area.

Customers in the United States are demanding higher safety, which is propelling the demand for passenger vehicles

The United States has one of the largest automotive markets in the world and ranks 8th in the production of passenger cars, producing 2.5 million units in 2019.

Post the COVID-19 outbreak, there has been a major decline in production, registering a Y-o-Y drop of 24%, along with a decline in the usage of personal vehicles for commuting. Maintenance activities of passenger vehicles have significantly declined. With the ease of lockdown measures, there has been a surge in the usage of personal vehicles, which may drive the recovery of passenger vehicle consumption.

The production of passenger vehicles in the United States reached 1.72 million units as several OEMs became interested in increasing their production capacity to meet the growing demand for electric vehicles. The government policy of 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 also 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%.

Sales of ICE models have been steadily decreasing. The number of available ICE options was 3% to 4% lower in the United States in 2022 than in 2016. Several factors help increase sales of electric cars in the United States. More available models beyond those offered by OEMs help close the supply gap.

The United States holds the second largest FCEV stock, with over 15,000 FCEVs. Most of these are fuel-cell cars. In 2022, the stock of FCEVs in the United States increased by more than 20%. These key elements fuel production demand for passenger vehicles and are expected to increase in the future.

United States MLCC Industry Overview

The United States MLCC Market is moderately consolidated, with the top five companies occupying 41.51%. 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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