



# **Global and China Automotive Wiring Harness Industry Report, 2010-2011**

**June, 2011**

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**2. Global and Chinese Automobile Market**

**2.3 Chinese Automobile Market in 2010**

**2.3.1 Overview**

In 2010, Chinese automobiles witnessed \*\*\*\* million and \*\*\*\* million in its full-year production and sales, year-on-year up by 32.44% and 32.37% respectively. Of which, \*\*\*\* million and \*\*\*\* million respectively for the passenger cars, growing by 33.83% and 33.17% separately; and \*\*\*\* million and \*\*\*\* million for commercial vehicles, rising by 28.19% and 29.90% correspondingly. So all the models achieved all-round progress in 2010 and the automobiles production and sales kept the hot trend in 2009, with automobile population nearly \*\*\*\* million and a higher market share of the self-owned brand.

**China's Automobile Sales Volume, 2001-2010**



**China's Automobile Sales Volume by Month, 2010**



**China's Sedan Sales Volume by Month, Jan 2006-Dec 2010**



### 3. Automotive Wiring Harness Market and Industry

#### 3.4 Chinese Industry

In the auto wiring harness industry of China, Japanese enterprises grasp 60% market share, following by the counterparts from South Korea including YURA, Kyungshin Industrial and Yujin which occupy 15% altogether. It had 42 auto wiring harness manufacturers whose revenue surpassed RMB100 million in 2009, among which including only five domestic ones, namely, Tianhai Group, Huguang, Nantong Unistar, JAC Xinfa and Brilliance Taian. And the last two ones are associated with automotive manufacturers while Nantong focuses on coaches.

**Market Occupancy of Leading Automotive Wiring Harness Manufactures in China by Revenue, 2010**



SUMITOMO ELECTRIC	****
YAZAKI	****
DELPHI	****
LEONI	****
FURUKAWA ELECTRIC	****
LEAR	****

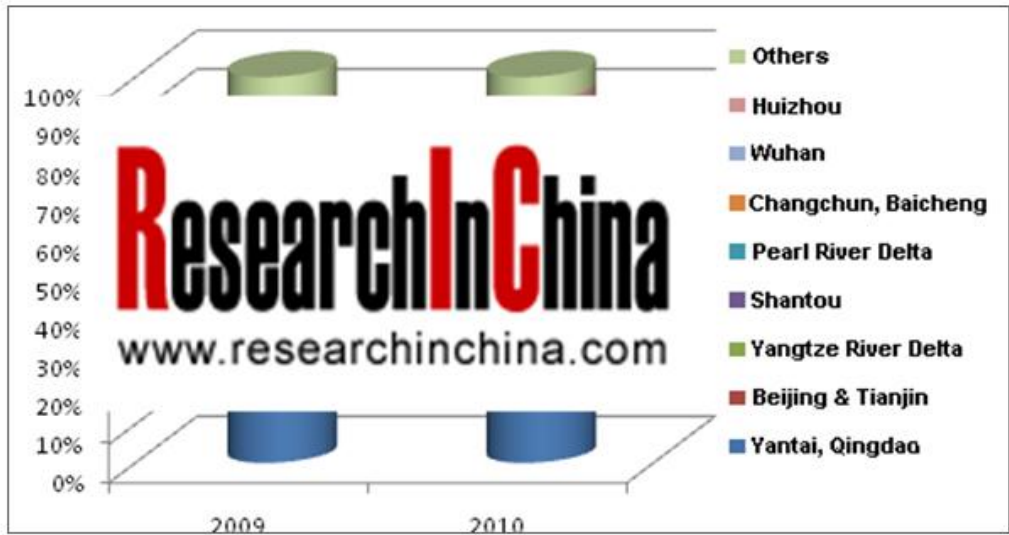
Kyungshin Industrial	****
Coroplast	****
THB	****
FUJIKURA	****
YURA	****
OTHERS	****

**Listing of Top 41 Auto Wiring Harness Manufacturers in China by Revenue, 2010 (RMB mln)**

CSEB	****
Tianjin Jinzhu Auto Wiring Harness	****
SUMITOMO ELECTRIC Wuhan	****
Chongqing Jinzhu Auto Wiring Harness	****
SUMITOMO ELECTRIC Fuzhou	****
SUMITOMO ELECTRIC Huizhou	****
Hui Zhou Zhurun Wiring Systems	****
Huizhou Zhurun Automotive Wire Co.,Ltd.	****
Huizhou Jinhui Wiring Harness	****
Suzhou Sumidense Mediatech Co., Ltd.	****
HZC	****
Delphi Packard Electric Systems Changchun	****
Delphi Packard Electric Systems Baicheng	****
Delphi Packard Electric Systems Guangzhou	****
Delphi Packard Electric Systems Yantai	****
Delphi Packard Electric Systems Wuhan	****
Delphi Packard Electric Systems Shanghai	****
YAZAKI Tianjin	****
YAZAKI Hangzhou	****
YAZAKI Shantou	****
YAZAKI South China	****
YAZAKI Yantai	****
YAZAKI Foshan	****
YAZAKI Zhangzhou	****
LEONI Shanghai	****
LEONI Changchun	****
LEONI Changzhou	****
FURUKAWA ELECTRIC Huizhou	****
FURUKAWA ELECTRIC Shenzhen	****
Shanghai Jinting	****

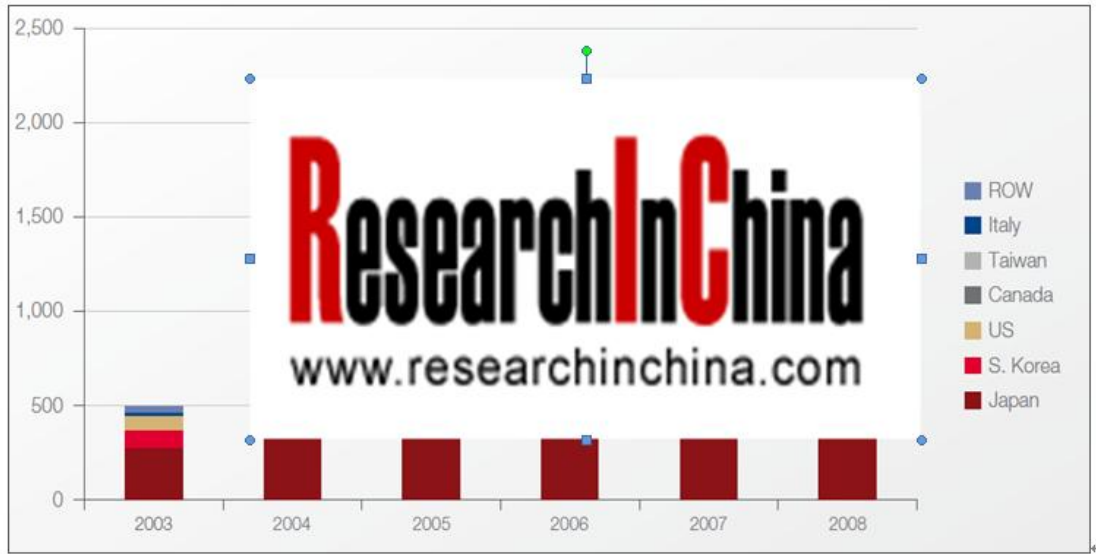
Wuhan Lear-DFM Auto Electric Co. Ltd	****
Kyungshin Industrial Qingdao	****
Kyungshin Industrial Jiangsu	****
CSEB	****
Beijing Tianhai Industry	****
Fujikura Zhuhai	****
Fujikura Changchun	****
Beijing Yura Electrical Appliance	****
Beijing Yuluoerte	****
Weihai Shiyuan Electrical Appliance Assembly	****
Rongcheng Yura Electronics	****

**China Auto Wiring Harness Output Value by Region, 2009-2010**



	Yantai, Qingdao	Beijing & Tianjin	Yangtze River Delta	Shantou	Pearl River Delta	Changchun, Baicheng	Wuhan	Huizhou	Others
2009	****	****	****	****	****	****	****	****	****
2010	****	****	****	****	****	****	****	****	****

**Export Destinations of China's Auto Wiring Harness Products, 2003-2008**



#### 4. Manufacturers of Automotive Wiring Harness

##### 4.3 Yazaki

Established in 1941, Yazaki has 437 branch offices in 39 countries. There are 157,100 employees in the company, of which, 22,000 works in Japan. Yazaki is the largest private unlisted company in the world. The fiscal year of the company ends with late June. As the world’s biggest automotive wiring harness manufacturer, the auto parts business represents 83% of its revenue. Meanwhile, the company also engages in the production of auto electronics, auto instruments, auto traveling data recorders, taximeter as well as wires.

**Revenue of Yazaki in Japan and Foreign Countries, FY2004-FY2008**



	2004	2005	2006	2007	2008	2009	2010
Revenue (JPY 100M)	****	****	****	****	****	****	****

In 2011, Yazaki investigated Xiaogan City in Hubei Province for the investment of new base which has not been confirmed yet.



**4.3.1 Tianjin Yazaki Automotive Parts**

Tianjin Yazaki Automotive Parts, one of the enterprises invested by Yazaki and registered in China, was founded in 1988 with the registered capital of US\$19.634 million. Located in Tianjin Economic & Technological Development Zone, the company presently possesses the land area of 110 thousand m<sup>2</sup> and over 4000 employees.

**Brief Financial Data of Tianjin Yazaki Automotive Parts, 2007-2010**

	Employees	Operating Income	Export Delivery Value	Main Business Cost	Operating Profit	Total Intermediate Input	Industrial Input	Direct Materials
2007	****	****	****	****	****	****		****
2008		****						
2009	****	****						
2010	****	****	****		****			

(Unit: RMB1K)

It set up Chengdu Branch of Tianjin Yazaki Automotive Parts in March 2000, and the Branch expanded the new factory in October 2004. Changchun Branch of Tianjin Yazaki Automotive Parts was established in August 2004 with the floor area of 17000m<sup>2</sup>, and it mainly supplies for FAW Car Co., Ltd. In January 2007, Cangzhou Branch of Tianjin Yazaki Automotive Parts was founded, and the Phase I project of 10070m<sup>2</sup> standard workshop was put into operation and the 6 production lines practiced normal production in 2008; the Phase II project of 13000m<sup>2</sup> standard workshop acquired the acceptance of main work in March 2009 and was officially put into operation in that July. The revenue of Tianjin Yazaki Automotive Parts registered RMB150 million or so in 2010.

**Brief Financial Data of Chengdu Branch of Tianjin Yazaki Automotive Parts, 2007-2009**

	Employees	Revenue	Export Delivery Value	Main Business Cost	Operating Profit	Total Intermediate Input	Industrial Input	Direct Materials
2007	****	****	****	****	****	****		****

(Unit: RMB1K)

Cangzhou Branch of Tianjin Yazaki Automotive Parts characterizes the gross investment of RMB300 million (US\$40 million), the land area of 66mu, and the annual production scale of 400 thousand sets of automotive wiring harness. Promisingly, the revenue can reach RMB600 million in 2011, the annual profit & tax will hit RMB36 million, and more than 2000 jobs will be provided. The product markets of the project currently cover BBDS, SGM, Zhengzhou Nissan, etc., and they have been exported to North America after 2009.

**4.3.2 Hangzhou Yazaki Automotive Parts**

Established in February, 2002, Hangzhou Yazaki Automotive Parts is a self-owned Japanese enterprise under Yazaki who boasts over 430 factories in 38 countries and more than 180 thousand employees and it has set up 16 factories with more than 30 thousand employees in China. With the registered capital of US\$45 million and the total investment of US\$120 million, Hangzhou Yazaki Automotive Parts is specialized in the production of such components as auto wires, instruments, switch groups, central electric controller, and socket connectors.

**Brief Financial Data of Hangzhou Yazaki Automotive Parts, 2007-2010**

	Employees	Operating Income	Of Which: Export Delivery Value	Main Business Cost	Operating Profit	Total Industrial Intermediate Input	Of Which: Direct Materials
2007	****	****	****	****	****	****	****
2008	****	****					
2009	****	****					
2010	****	****	****		****		

The assets in 2008 were RMB1158.094 million.

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