



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

Jun. 2011

This report

- ◆ **Analyzes global and Chinese automobile market.**
- ◆ **Focuses on the automotive wiring harness market and industry.**
- ◆ **Highlights the operation of manufacturers of automotive wiring harness.**

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Abstract

The automotive wiring harness market touched bottom in 2009. The automotive industry suffered a downturn from August 2008 to July 2009, and started to recover at the end of 2009. The global automotive wiring harness market size reached USD21.9 billion in 2009, and increased by 32.2% to USD29 billion in 2010.

Revenue of Top 11 Manufacturers of Automotive Wiring Harness, 2009-2010 (USD mln)

	2009	2010	YOY
<i>YAZAKI</i>	7548	9108	20.7%
<i>SUMITOMO ELECTRIC</i>	5065	7974	57.4%
<i>DELPHI</i>	3022	4330	43.3%
<i>LEONI</i>	1531	2166	41.5%
<i>LEAR</i>	1090	1448	32.8%
<i>FURUKAWA ELECTRIC</i>	914	940	2.8%
<i>FUJIKURA</i>	656	753	14.8%
<i>KYUNGSHIN INDUSTRIAL</i>	474	656	38.4%
<i>YURA</i>	456	583	27.9%
<i>COROPLAST</i>	400	412	3%
<i>THB</i>	161	240	49.1%

Sumitomo Electric with copper resources experienced the highest growth among the top 11 manufactures in 2010, getting closer to the first place Yazaki and farther from the third place Delphi. It has 11 production bases in China, the most among all major wiring harness manufacturers. Its production bases mainly address the Chinese market, while Yazaki's are mostly export-oriented.

Delphi settled most of its production bases in Changchun, Baicheng and Shanghai, and few in other regions. It has no presence in the Pearl River Delta region where Japanese automobile manufacturers are clustered. It occupies a very small proportion in the supply chains of Japanese enterprises, while Sumitomo, Yazaki and Fujikura hold a very large proportion of the supply to American and German automakers. For example, Fujikura gains 25% of its revenue from Volkswagen.

LEONI is mainly oriented to German and French markets, and makes 47% of its revenue from Mercedes-Benz, BMW, Audi and PSA; its revenue increased 41.5% in 2010 by virtue of the soaring sales volume of luxury cars in China. In the first quarter, a traditional off-season, China's luxury car market continued its rapid growth, so did LEONI's revenue, with EBIT growing by 270% year on year in the first quarter of 2011.

Although Furukawa boasts its own copper resources, it has focused its investment on power cable and electronics industry instead of automotive wiring harness. Therefore, its revenue from automotive wiring harness saw limited growth in 2010. LEAR is a large seat maker focusing on North American market, and has only one base in Wuhan, China. Kyungshin Industrial is an enterprise with 50% stake held by Sumitomo Electric. It's the largest automotive wiring harness enterprise in South Korea.

Small automotive wiring harness producers are much weaker than large manufacturers in competition, and are usually the third or fourth suppliers, and the growth is not so fast.

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