



**Global and China Connector Industry
Report, 2010-2011**

July 2011

This report

- ◆ **Analyzes the connector market worldwide.**
- ◆ **Focuses on the application industries of connectors**
- ◆ **Highlights the key connector enterprises.**

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Abstract

Connector industry is a mature industry. The market size of global connector industry reached USD45.3 billion in 2010, up 28.4% YoY. Connector is widely applied in the industries including automobile, computer, telecommunication, manufacture, consumer electronics, aviation and military.

Occupying approximately 21.4% of the connector market, automobile industry is the largest consumption field of connector. On average, each car needs connectors valued at about USD102. Generally speaking, automotive connectors are sold to auto wiring harness enterprises and further distributed to auto manufacturers. However, large scale auto wiring harness enterprises usually have connector production capability, which enables them to be large connector manufacturers as well, such as the top 3 auto wiring harness manufacturers - Yazaki, Sumitomo Electric and Delphi. Concerning enterprises with automotive connector accounting for the largest proportion of revenue, TYCO Electronics, FCI and KET ranked the top 3.

Top 23 Connector Manufacturers Worldwide (by Revenue), 2009-2011 (USD mln)

	Country (Region)	2009	2010	2011E
TYCO	USA	6005	7889	8686
Amphenol	USA	2567	3528	3758
Molex	USA	2480	2986	3688
Honhai	Taiwan	1588	2669	3226
FCI	France	1306	1697	1988
Yazaki	Japan	1260	1412	1420
Hirose	Japan	939	1053	1218
Sumitomo Electric	Japan	725	988	1160
JST	Japan	1364	1062	980
JAE	Japan	786	973	980
Delphi	USA	680	726	780
Foxlink	Taiwan	444	595	728
LuXshare	Mainland China	85	149	388
KET	Korea	202	304	368
LOTES	Taiwan	126	222	261
NAIS	Japan	188	208	258
JONHON	Mainland China	162	219	258
Deren	Mainland China	95	144	177
YEONHO	Korea	126	153	168
ACES	Taiwan	138	136	166
ACON	Taiwan	143	159	160
P-TWO	Taiwan	116	141	132
SUYIN	Taiwan	145	132	122

The market of desktop computer connector is dominated by international large scale enterprises, wherein, Honhai enjoys the highest market share. However, desktop computer connector market presents steady development in want of growth momentum. As 98% notebook computers are produced by OEMs in Taiwan, there are as many as over 200 enterprises engaged in notebook connector manufacturing in Taiwan, which are the most in the world. Most of the enterprises are valued at NTD1 billion to NTD7 billion, and Honhai is the largest one among them.

There are approximately 35-45 connectors which are worth USD10 in a single notebook computer. Besides, a single notebook computer needs various kinds of connectors, among which CPU socket enjoys the highest production value. In particular, CPU socket production value of the new platform - Intel Capella registers as high as USD3-USD4, which is the biggest source of income of Honhai and LOTES. Connector price of independent display adapter in other notebook computer is over USD1. In Taiwan, the top 3 connector enterprises with the highest profit are all notebook related companies, namely, LOTES (CPU socket manufacturer), ALLTOP and ACES (with higher proportion of notebook connector production). In terms of CPU socket, Honhai, Tyco, Molex and LOTES are the top 4 manufacturers in the world.

Connector is an important electronic component for a mobile phone, and its quality is directly related to the quality and reliability of the mobile phone. Most of the quality problems of mobile phone are related to the connectors. According to the different types of mobile phone, the amount of connectors used is around 5-15 on average. Categories of connector include internal FPC connector, board to board connector, external I/O connector, battery connector, SIM card connector and camera socket.

AMPHENOL, the largest mobile phone connector manufacturer, specializes in precision interface connection, such as SIM card connector, SD card connector, USB connector, HDMI connector and RF convertor. Meanwhile, Japanese manufacturers are skilled at producing FPC connector and board to board connector. JAE and JST have advantage in manufacturing PFC and TF card connector. Panasonic NAIS is expert in producing board to board connector, whose largest client is Apple. Hirose also excels in manufacturing board to board connector.

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