



**China Wire and Cable Industry Report,
2011**

Dec. 2011

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

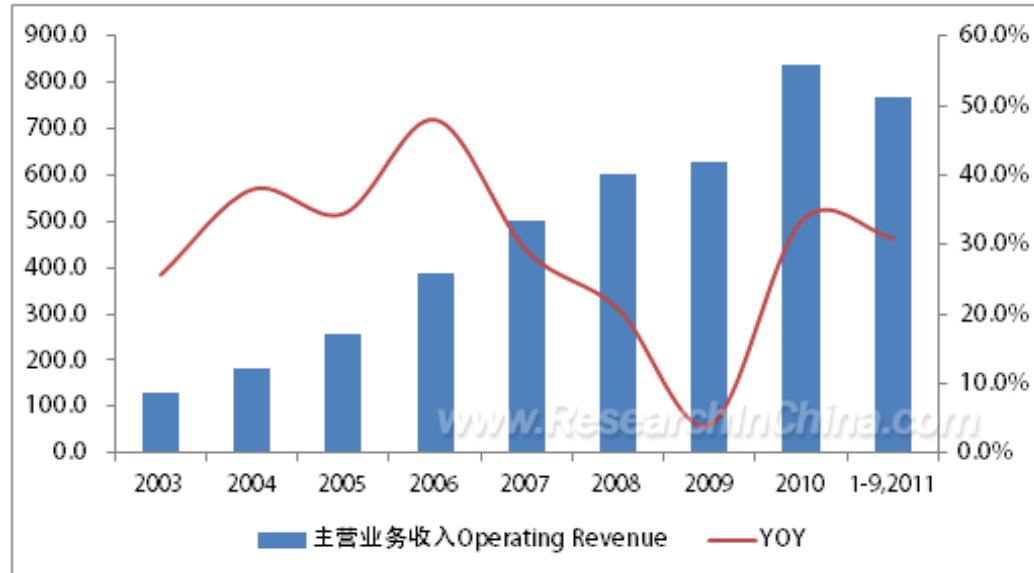
INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind and China Electrical Equipment Industrial Association Wire and Cable Branch etc.

Abstract

China is the world's biggest wire and cable manufacturer, with the largest industrial output value. In 2003-2010, its operating revenue of China's wire and cable industry grew at a compound annual growth rate (CAGR) of 30.6%, towering over the global level; from January to September 2011, the operating revenue increased by 30.9% YoY to RMB767.5 billion.

Operating Revenue and YoY of Wire and Cable Industry in China, 2003-2011 (RMB billion)



Source: National Bureau of Statistics of China

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During the 12th Five-Year Plan period (2011-2015), China's investment in ultra high voltage (UHV) and rural power grid will reach up to RMB540 billion and RMB200 billion respectively. Following the expanded investment in power grid, the power cable industry will usher in a new round of development opportunities. In China, major enterprises in the high voltage (HV) and extra high voltage (EHV) power cable industry include Baosheng Science & Technology, Qingdao Hanhe Cable and Shenyang Furukawa Cable.

The development of telecommunication industry has provided constant impetus for China's optical fiber cable construction, with the accumulated cable length increasing from 2.71 billion meters in 2003 to 9.95 billion meters in 2010 at a CAGR of 20.4%. Larger-scale manufacturers include Yangtze Optical Fibre and Cable, Fiberhome Telecommunication, Heng Tong Group, Zhongli S&T, etc.

In 2010, China's automotive wiring harness market scale reached RMB82.2 billion, mainly occupied by Japanese and South Korean multinational corporations, of which, Japanese enterprises took over 60% market share. Major automotive wiring harness manufacturers in China include Shanghai-based Delphi Packard Electric System, Huizhou Zhurun Wiring Systems, Hangzhou Yazaki Parts, THB Group, etc.

China Wire and Cable Industry Report, 2011 highlights:

- ✘ Global and China Wire and Cable Industry Development, including market scale, competition characteristics and pattern, China wire and cable industry by region, import and export, development trend, and so on;
- ✘ Key Market Segments of China Wire and Cable Industry, referring to market scale, demand, major enterprises, etc. of three market segments, i.e., power cable, communication cable & optical fiber cable, and automotive wiring harness;
- ✘ Research on Global and China Key Wire & Cable Manufacturers, covering operation and development strategies of four multinational corporations including Nexans and 16 Chinese enterprises such as Qingdao Hanhe Cable.

Nexans is a French wire & cable manufacturer, with products mainly applied in infrastructure, construction industry and local area network (LAN). In 2011, Nexans acquired the power cable business of Shandong Yanggu Electric Cable Group Co., Ltd. and developed 500kV EHV cable products, marching towards China's high-end power cable market.

Far East Holding Group is the largest wire and cable enterprise in China. In July 2011, it raised RMB1.15 billion, mainly invested in projects including Smart Grid EHV Cable, New-energy Special Cable, and High-strength Energy-saving Environment-friendly Special Wire.

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