



**Global and China Automotive Wiring
Harness Industry Report, 2011-2012**

Apr. 2012

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 National Bureau of Statistics of China and Wind etc .

Abstract

In 2011, luxury car is the star performer in the stagnating Chinese automotive market, and the wiring harness for each luxury car valued 2-3 times as that in low-end cars. The North American automotive market, particularly commercial vehicle, witnessed the robust recovery and the market size grew 14.6% over 2010. In 2012 and 2013, Chinese luxury car market is expected to grow continually, making up for the declining European market. Moreover, the increasing application of electronic devices in automobiles will drive the wiring harness market to rise slightly.

In 2011, the breaking news for the automotive wiring harness industry was that Yazaki, Denso and Furukawa suffered severe punishment imposed by the U.S. Department of Justice for price-fixing of wiring harness in the past decade. Yazaki paid a USD470 million fine, Denso USD78 million fine and Furakawa USD200 million. Yazaki is the world's largest automotive wiring harness manufacturer, Furukawa ranks No. 6, while Denso basically drops out of the automotive wiring harness business.

The severe penalty will not change the industrial pattern, but the Japanese wiring harness manufacturers will be more cautious in the U.S.

Facing the “triple whammy” of 311 Earthquake, yen's appreciation and Thailand Flood, Japanese wiring harness players still performed well due to their global presence. For instance, Yazaki had had 421 bases and 163 subsidiaries, and employed a total of 192,541 workers in 39 countries by the end of 2011. Sumitomo Electric saw a lower growth rate because its domestic business accounts for a larger proportion.

Germany-based LEONI, fueled by the German luxury car, was affected by the Eurozone debt crisis for its 65% of business was concentrated in Europe. LEONI lagged far behind Japanese wiring harness manufacturers in business layout in China, or it should have seen a higher rise in revenue. American LEAR, also one of the leading auto seat suppliers, witnessed the soaring revenue driven by the strong recovery of the U.S. automotive industry.

Furukawa continually increased its investment in automotive wiring harness. It projected USD25.75 million to acquire the connector business of Mitsubishi Cable at the end of 2011 and invested JPY10 billion to build a new plant in the Philippines. Germany Volkswagen, other than Japanese enterprises, is the biggest customer of Fujikura's automotive wiring harness business, so Fujikura enjoyed the highest growth rate among Japanese companies. South Korean YURA also benefited from increased sales of Hyundai Motor.

Finnish PKC prided itself on the highest growth rate of revenue. The company acquired U.S. AEES in the fall of 2011, and its revenue is expected to reach USD1.16 billion in 2012. PKC gives priority to wiring harness for Pick Up, Light Truck, Heavy Truck and Bus, the most rapidly growing market in the U.S. automotive industry.

THB, the first largest automotive wiring harness producer in China, fell 5.9% (or 12.4% if calculated in RMB) in revenue, mainly because THB focuses on wiring harness for local vehicles which saw a slipping market share. In February 2012, THB sold its major business to Shenzhen Deren Electronics.

	2009	2010	2011	2011/2010
YAZAKI	7,548	9,808	11,236	14.6%
SUMITOMO LECTRIC	6,384	7,974	8,958	12.3%
DELPHI	3,022	4,330	5,117	18.2%
LEONI	1,531	2,166	2,688	24.1%
LEAR	1,090	1,448	1,819	32.8%
FURUKAWA ELECTRIC	914	940	980	4.3%
YURA	456	705	900	27.7%
FUJIKURA	656	753	899	19.4%
Kyungshin Industrial	474	656	730	11.3%
PKC	263	419	635	51.6%
Kromberg & Schubert	350	370	418	13.0%
Coroplast	400	412	408	-1.0%
THB	161	240	226	-5.9%

source: Global and China Automotive Wiring Harness Industry Report, 2011-2012

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