



Global and China Wiring Harness Industry Report, 2012

Dec. 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 China Customs, and National Bureau of Statistics of China etc.

Abstract

The global automotive wiring harness market size was USD 24.3 billion in 2009, and rebounded strongly in 2010, especially in China. In addition, the soaring copper price has also expanded the market size, to USD 31.6 billion in 2010, up 29.9% year on year. In 2011, the copper price continued to rise, and the application of automotive electronics also increased the market size of wiring harness.

In 2012, driven by the demand from North America, Japan and xEV market, the wiring harness market scaled USD 40.1 billion, a year-on-year growth of 9.7%. It's expected that the market growth will slow down in 2013, and the copper price will also fall slightly.

Japanese manufacturers are big winners in the automotive wiring harness market in 2012, while American and European manufacturers lag far behind. The gap between the No.1 Yazaki and No.2 Sumitomo Electric has increased. Yazaki acquired a Russian wiring harness enterprise in mid 2012, and made Tata Yazaki Autocomp as its wholly owned subsidiary in November 2012 by acquiring 50% stake held by Tata.

Due to the devotion to the Asia-Pacific market, Delphi lost its North

America market, which was seized by Japanese enterprises. As the North America market performed much better than the Asia-Pacific market (especially the Chinese mainland market), thus Delphi suffered a rare decline. However, Delphi performed well in the Chinese mainland market and further consolidated its championship in the Chinese mainland market. Lear encountered the same situation, but the performance basically remained flat with a year earlier.

Revenue of 13 Major Automotive Wiring Harness Companies, 2009-2012 (Unit: USD mln)

	2009	2010	2011	2012	Growth Rate
SUMITOMO ELECTRIC	6384	7974	8958	9980	11.4%
YAZAKI	7548	9808	11236	12920	15.0%
DELPHI	3022	4330	5117	4749	-7.2%
LEONI	1531	2166	2688	3010	12.0%
FURUKAWA ELECTRIC	914	940	980	1127	15.0%
LEAR	1090	1448	1819	1810	-0.5%
Kyungshin Industrial	474	656	730	790	8.2%
Coroplast	400	412	408	360	-11.8%
THB	161	240	226	210	-7.1%
FUJIKURA	656	753	899	1097	22.0%
YURA	456	705	1100	1288	17.1%
Kromberg & Schubert	350	370	418	410	-1.9%
PKC	263	419	635	1140	79.5%
Others	1018	1306	1338	1208	-9.7%

Source: RIC Global and China Wiring Harness Industry Report, 2012

Japanese manufacturers have benefited from the recovery of the Japanese market. The market base in 2011 was low due to the impact from the earthquake, and rebounded strongly in 2012. The annual output in 2012 is expected to grow by 18% year on year, the highest in the world.

Small plants in Europe are underperforming, primarily due to the economic downturn in Europe. Chinese mainland enterprises have also witnessed decline for two consecutive years due to the decreasing sales volume of domestic automobile. Benefitting from the commercial vehicle market outburst in USA and the acquisition of AEES in 2011, PKC has improved its performance significantly. The performance of small and medium-sized manufacturers has declined significantly subjected to the continuous suppression from large manufacturers.

Since 2011, China's automotive wiring harness industry has been migrating towards the inland, and most companies have transferred capacity to Chengdu, Chongqing and Wuhan. Delphi set up Chengdu base in June 2011, which was officially put into production in September 2012; it started the construction of Chongqing base in October 2012, which is expected to be put into production in June 2013. Yazaki set up a base in Xiaogan, Hubei in June 2011, which started commission in

May 2012. LEONI completed the acquisition of Daekyeung at the end of 2011, obtaining the latter's three production bases in Jining, Penglai and Qingdao. Lear's Wuhan base set up Chongqing branch in 2003, which delivered remarkable performance in 2012 and increased the revenue of Lear Wuhan by nearly 50%. South Korean Yura started the construction of bases in Baoding of Hebei and Heze of Shandong in 2011, which started production in 2012.

In 2012, Yazaki bases in China grew rapidly, especially the Yantai and Zhangzhou bases. Yantai Yazaki is mainly engaged in export business, and its annual revenue is expected to increase from RMB 1,252 million in 2011 to RMB 2,210 million. The revenue of Zhangzhou Yazaki is expected to increase from RMB 403 million in 2011 to RMB 750 million.

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