



Global and China Automotive Connector Industry Report, 2012

Jan. 2013

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 Company Reports, China Customs, and National Bureau of Statistics of China etc.

Abstract

The report highlights the followings:

1. Global and China Automobile Market
2. Global and China Automobile Industry Pattern
3. Automotive Wiring Harness and Connector Market
4. 11 Leading Automotive Connector Manufacturers

The automotive connector market size approximated USD10.69 billion in 2012, an increase of 5.1% from a year earlier, and the figure in 2013 will reach USD11.029 billion with a growth rate of 3.2%.

Automotive connector has close bearing on automotive wiring harness since the direct customers of automotive connector are the producers of automotive wiring harness instead of the automakers. Automotive wiring harness manufacturers can produce automotive connectors internally and they also can make procurement from the outside. It is clear that, for automotive wiring harness manufacturers, internal production can to some extent improve both profitability and market share.

As the largest automotive wiring harness manufacturer with the market share of 32% in the world, YAZAKI has always been making efforts to raise the ratio of internal production of connectors. SEI, short for Sumitomo Electric Industries, is the global second largest producer of

automotive wiring harness, holding a market share of 25%, but its internal production of connectors accounts for a small proportion, which also restricts the development of the company. The gap between SEI and YAZAKI is being widened.

Ranking of Leading Automotive Connector Manufacturers Worldwide by Revenue, 2010-2012 (Unit: USD mln)

	2010	2011	2012E
TYCO	3,310	2,972	3,100
YAZAKI	1,718	1,812	1,924
SEI	806	960	1,070
DELPHI	1,030	990	1,060
FCI	778	948	971
Molex	600	610	593
JAE	250	333	454
KET	304	371	408
Amphenol	250	236	205
HIROSE	85	129	190

Source: researchinchina

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DELPHI is the fourth largest manufacturer of automotive connectors around the globe. In order to narrow the gap, Delphi acquired the MVL of FCI in May, 2012 and outperformed YAZAKI to become the world's second largest automotive connector producer. This favors Delphi to sweep more market share in automotive wiring harness field.

JAE and HIROSE, the two Japanese players, are developing fast, mainly fuelled by Japan-based SEI; however, the two which are professional in the fields of mobile phone and notebook have been squeezed by the peers from Taiwan and have to greatly explore automotive connector business.

Molex is focused on mobile phone and telecom sectors, but it also has started to attach importance to automotive sector in recent years. Amphenol is mainly involved in the areas of telecom, IT and mobile phone. We believe SEI's acquisition on the automotive connector business of Amphenol is a very good choice.

KET is a South Korea-based company with the share participation of YAZAKI and with Hyundai Motors as its key customer. Bolstered by rapid progression of Hyundai Motors, KET's market share grows steadily.

1 Global and China Automobile Market

- 1.1 Global Automobile Market
- 1.2 Global Automotive Industry Pattern

2 China Automobile Market

- 2.1 Recent Developments
- 2.2 Status Quo of Passenger Car Market
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- 3.1 Market Size
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4 Automotive Connector Manufacturers

- 4.1 Sumitomo Electric Industries
 - 4.1.1 Changchun SE Bordnetze
 - 4.1.2 Tianjin Jin-Zhu Wiring Systems
 - 4.1.3 Wuhan Sumiden Wiring Systems
 - 4.1.4 Chongqing Jin-Zhu Wiring Systems
 - 4.1.5 Fuzhou Zhu Wiring Systems
 - 4.1.6 Fujian JK Wiring Systems
 - 4.1.7 Huizhou Zhucheng Wiring Systems
 - 4.1.8 Huizhou Zhurun Wiring Systems
 - 4.1.9 Sumidenso Mediatech Suzhou

- 4.1.10 Huizhou Zhucheng Wiring Systems
- 4.1.11 Suzhou Bordnetze Electrical Systems
- 4.2 Delphi
 - 4.2.1 Delphi Packard Electric System Changchun
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- 4.4 TYCO Connectivity
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 - 4.6.1 Amphenol EastAsia Electronic

- 4.6.2 Amphenol Shenzhen
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