



# Global and China Automotive Connector Industry Report, 2014-2015

Dec. 2014

## **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, and National Bureau of Statistics of China etc.

## Abstract

Global and China Automotive Connector Industry Report, 2014-2015 contains the followings:

1. Overview of Global and Chinese Automotive Market
2. Analysis on Automotive Connector Industry and Market
3. Research on 13 Major Automotive Connector Companies

As the most potential segment in the connector industry, automotive connectors will trigger the market value of USD12.7 billion (up 5.3% from 2013) in 2014, whilst the global connector market is expected to hit USD50.2 billion (representing a slight increase of 2.6% compared with 2013). The growth of the automotive connector market is attributed to: First, the intensified automotive electronization (especially PEVs and PHEVs) generates more demand for connectors. Second, Chinese and American automotive markets grow strongly, particularly luxury cars and SUVs featured with higher electronization degree and higher requirements on quality grow aggressively.

Although the Chinese sedan market underperforms, the SUV market has maintained the growth rate of more than 40% and the luxury car market has also performed well. In 2015, the global automotive connector market is expected to grow 3.5% and reach USD13.1 billion; the overall connector market is expected to grow slightly by 2.2%.

### Ranking of Automotive Connector Companies by Revenue, 2013-2014

(USD mln)

	2013	2014E
TE	4110	4568
YAZAKI	2246	2508
DELPHI	1420	1460
SUMITOMO	560	608
Molex	688	716
Amphenol	554	680
JAE	530	520
KET	413	460
JST	360	350
Kyocera	260	250
Rosenberg	185	180
HIROSE	180	185
Hulane	94	107

Automotive connector companies can be divided into three types, namely versatile connector companies, automotive wiring harness companies and professional automotive connector companies. Although covering a broad business scope, numerous versatile connector companies lack growth potentials. Automotive wiring harness companies and professional automotive connector companies have more potentials and high profitability. For example, Taiwan Hu Lane Associate mainly serves BYD, Changan Automobile and Great Wall Motors, and has entered the supply chain of Shanghai GM successfully recently. The gross margin of Hu Lane Associate always remains at above 40% and its operating margin has seen growth for consecutive five years, which large companies even can not compare with. Hu Lane Associate not only maintains stable performance, but also absorbs new customers every year.

Three automotive wiring harness giants are strengthening connector business. Japanese companies are trying to improve their supply capacity, while American and European counterparts are acquiring small firms actively. Delphi acquired FCI's MVL Division in 2012, and took over North America's largest automotive window connector company – Antaya in September 2014.

### **1. Global Automobile Market**

- 1.1 Global Automobile Market
- 1.2 Global Automobile Industry

### **2. China Automobile Market**

- 2.1 Overview
- 2.2 Passenger Vehicle Market Status
- 2.3 Passenger Vehicle Market Analysis
- 2.4 Commercial Vehicle Market
- 2.5 Monthly Sales Volume of Major Automakers
- 2.6 China Automobile Industry

### **3. Automotive Connector Market and Industry**

- 3.1 Introduction to Connector
- 3.2 Examples of Connector
- 3.3 Classification of Connector
- 3.4 Connector Market Size
- 3.5 Automotive Connector Market
- 3.6 Automotive Wiring Harness Industry
- 3.7 Automotive Connector Rankings

### **4. Automotive Connector Manufacturers**

- 4.1 TE CONNECTIVITY
- 4.2 MOLEX
- 4.3 AMPHENOL
- 4.4 JAE
- 4.5 JST
- 4.6 HIROSE
- 4.7 SUMITOMO ELECTRIC INDUSTRIES
- 4.8 DELPHI
- 4.9 YAZAKI
- 4.10 KET
- 4.11 KYOCERA
- 4.12 HU LANE ASSOCIATE INC.
- 4.13 ROSENBERG

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