

Global and China Automotive Relay Industry Report, 2014-2018

Mar. 2015

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

Automotive relay, an important electronic component among automotive parts, finds widespread application in starting, preheating, cooling, fan, air-conditioning, lighting, electronic injection, oil pump, and other control systems. Automotive relay is second only to electronic sensor in terms of consumption in automobile, 20-70 pieces for single vehicle at present.

With improvement in automotive electronization and growing prevalence of new energy vehicle, China automotive relay industry has progressed steadily over the recent years. In 2014, the automotive relay industry of China registered revenue of about RMB3.5 billion, soaring 6.7% from RMB2.1 billion in 2010. It is expected the CAGR for 2015-2018 will remain above 20%.

Generally, the main circuit voltage of traditional vehicle is 12V or 24V, while that of new energy vehicle is typically above 200V. Hence, to cater to the development of new energy vehicle, high-voltage DC relay will be the R&D priority of automotive relay manufacturers. At present, Hongfa Technology Co., Ltd. boasts the capability of developing and producing high-voltage DC relay.

Manufacturers	Production Bases in China	Key Accounts
	Suzhou	 DAIMLER    
	Shanghai	 HONDA 
	Shenzhen	DAIMLER  TOYOTA 
	Xiamen	DAIMLER  GM 
	--	 HYUNDAI
	Ningbo Xiamen	  
	Shanghai	 GM 
	Guizhou Shanghai	 

Source: Global and China Automotive Relay Industry Report, 2014-2018; ResearchInChina

Global automotive relay market is dominated by TE Connectivity, Panasonic, LS, Omron, and other foreign companies. Being bullish about the Chinese market, most of these companies have built production bases in China.

TE Connectivity: a global leader in automotive relay market; posted global revenue of USD13.9 billion in FY2014, with 3% or so contributed by automotive relay; its Automotive Segment has two production bases in China (EPZ factory and NEPZ factory), of which NEPZ has started to manufacture automotive relay from 2014.

Omron: entered the Chinese market in 1978; recorded revenue of JPY995 billion in China in FY2014, 18.4% of the company's total revenue; automotive relay production base in China- Shanghai OMRON Control Components Co., Ltd. has 8 automotive relay production lines, and plans to introduce 15 advanced production lines in 2015.

Hongfa Technology Co., Ltd.: the largest local Chinese automotive relay manufacturer and also one of a few global high-voltage DC relay suppliers. In Dec. 2013, the company invested the raised funds to build 6 high-voltage DC relay production lines, which are expected to be completed and put into operation in 2016, adding annual capacity of 1.2 million pieces then.

Global and China Automotive Relay Industry Report, 2014-2018 by ResearchInChina highlights the following:

- Size, structure, and competitive landscape of global relay and automotive relay market;
- Size, structure, and competitive landscape of the Chinese relay and automotive relay market;
- Size and competitive landscape of global and Chinese auto and new energy vehicle market;
- Operation, revenue structure, and automotive relay business of 8 foreign and 9 Chinese automotive relay manufacturers.

1 Overview of Automotive Relay Industry

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- 1.2 Classification and Application
- 1.3 Development Trend

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6. Major Chinese Automotive Relay Companies

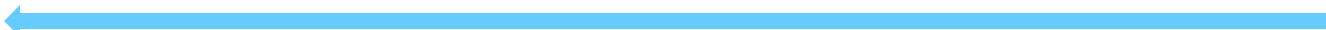
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