

Global and China Automotive Wiring Harness 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 Wiring Harness Industry Report, 2014-2015 covers the following content:

1. Global automobile market
2. China automobile market
3. Global automotive wiring harness market and industry
4. China automotive wiring harness market and industry
5. 18 global automotive wiring harness companies

Global automotive wiring harness market totaled USD24.3 billion in 2009, and rebounded in 2010 especially fueled by explosive growth in Chinese market, plus the skyrocketing copper price, the market size rose by 27.7% to USD31.9 billion. In 2011, the market size also ascended supported by continuously increasing copper price and improved automotive electronization. In 2012, benefited from North America, Japan and xEV market demand, wiring harness market kept growth of 10.5%. In 2013, slumping copper price, sluggish European economy and slipped sales volume of automobile in Europe caused the slowdown of wiring harness market, with growth rate merely 3.3%. In 2014, European economy extended its gloomy situation, Chinese automotive market fell down month by month, American market presented good performance, copper price continued declining, and Japanese Yen kept depreciation. Under such background, the wiring harness market in 2014 is projected to continue slowdown with growth rate only 2.6%.

Ranking of Global Major Automotive Wiring Harness Companies by Revenue, 2011-2014

(Unit: USD mln)

	2011	2012	2013	2014(E)
SUMITOMO ELECTRIC	8,958	9,980	9,661	9,608
YAZAKI	11,236	12,220	11,720	12,092
DELPHI	5,117	5,286	6,024	6,516
LEONI	2,688	2,824	3,035	3,080
FURUKAWA ELECTRIC	980	1,127	1,350	1,308
LEAR	1,819	1,810	2,170	2,453
Kyungshin Industrial	730	990	1,136	1,161
Coroplast	408	360	330	302
FUJIKURA	899	1,097	1,250	1,430
YURA	1,150	1,459	1,629	1,408
Kromberg & Schubert	418	410	400	360
PKC	635	1,199	1,174	1,080
Others	1,638	2,008	2,260	2,180

It is estimated that in 2015 the copper price will go on slumping, Chinese automotive market growth slacken to be 5%, European market continue depressed, American market will be slightly better. Thus, global automotive wiring harness market growth is forecasted to slow down continuingly, there will be lawsuits against wiring harness price manipulation continuously, the wiring harness companies will be forced to lower the price for playing up to administrative institutions and automakers, and the market size will get small growth of 1.3% to attain USD43.5 billion.

In 2014, China penalized three Japanese wiring harness manufacturers in the name of antimonopoly, so Japanese players reduced their investment in Chinese Mainland. The three big players including SEI, YAZAKI and FURUKAWA ELECTRIC got decreased sales from their bases in Chinese Mainland. Conversely, these Japanese players strengthened their investment in North America and Southeast Asia. Take YAZAKI as example, it recruited a large number of workers in North America, which made the total employees up over 20% till end of June 2014. It also vigorously expanded capacity in Thailand, Philippines and Vietnam.

Delphi continued to increase its investment in China. On one hand, it set up new production base in Tianjin; on the other hand, it expanded its capacity in Wuhan plant. LEONI invested Tieling of Liaoning in Dec.2013 and built new production base.

1. Global and Chinese Automotive Market

- 1.1 Global Automotive Market
- 1.2 Global Automotive Industry

2. Chinese Automotive Market

- 2.1 Overview of Chinese Automotive Market
- 2.2 Status Quo of Chinese Passenger Car Market
- 2.3 Chinese Passenger Car Market Analysis
- 2.4 China Commercial Vehicle Market
- 2.5 Monthly Sales Volume of Major Automakers in China
- 2.6 China Automotive Industry

3. Automotive Wiring Harness Market and Industry

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- 3.2 Chinese Automotive Wiring Harness Market
- 3.3 Global Automotive Wiring Harness Industry
- 3.4 China Automotive Wiring Harness Industry

4. Automotive Wiring Harness Corporation

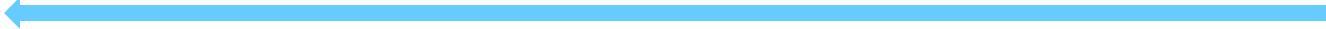
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 - 4.1.2 Tianjin Jin-Zhu Wiring Systems
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 - 4.1.5 Fuzhou Zhu Wiring Systems
 - 4.1.6 Fujian JK Wiring Systems


- 4.1.7 Huizhou Sumitomo Wiring Systems
- 4.1.8 Huizhou Zhurun Wiring Systems
- 4.1.9 Sumidenso Mediatech Suzhou
- 4.1.10 Huizhou Zhucheng Wiring Systems
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 - 4.2.1 Delphi Packard Electric System Changchun
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- 4.5.4 Furukawa Electric Hongkong
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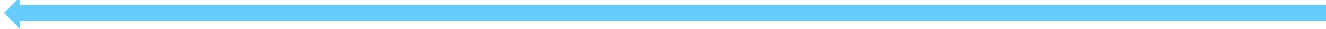
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