



Global and China Automotive Wiring Harness Industry Report, 2013

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

Abstract

Global and China Automotive Wiring Harness Industry Report

2013 includes the following aspects:

1. The current situation of the global automotive market
2. The current situation of Chinese automotive market
3. Global and China automotive wiring harness industry
4. 18 major automotive wiring harness manufacturers

The global automotive wiring harness market value climb 2.3 percent to USD40.3 billion in 2013, and is expected to reach USD41 billion in 2014, up 1.6% over 2013. The slow growth is caused by many reasons. The market share of two major Japanese players of automotive wiring harness totals more than 50%, while Japanese Yen devaluates by 24% in 2013, resulting in a significant decline in the market value counted in the U.S. dollar. Also, due to the decline in copper prices as well as the continuous lawsuits against wiring harness price manipulating, manufacturers are forced to reduce prices to please customers.

Revenue of Major Global Automotive Wiring Harness Companies, 2009-2013

(USD mln)

	2009	2010	2011	2012	2013	Growth rate
SUMITOMO ELECTRIC	6,384	7,974	8,958	9,980	9,661	-3.20%
YAZAKI	7,548	9,808	11,236	12,220	11,720	-4.10%
DELPHI	3,022	4,330	5,117	5,286	5,508	4.20%
LEONI	1,531	2,166	2,688	2,824	3,025	7.10%
FURUKAWA ELECTRIC	914	940	980	1,127	1,350	19.80%
LEAR	1,090	1,448	1,819	1,810	2,220	22.70%
Kyungshin Industrial	474	656	730	990	1,136	14.70%
Coroplast	400	412	408	360	330	8.40%
FUJIKURA	656	753	899	1,097	1,260	14.50%
YURA				1,459	1,629	11.70%
Kromberg & Schubert	350	370	418	410	400	-2.40%
PKC	263	419	635	1,099	1,100	0.10%
Others	1,518	1,506	1,638	2,008	2,260	12.50%

After the United States fined several large automotive wiring harness companies who controlled prices, the European Union penalized four wiring harness suppliers (Yazaki, Yazaki's European subsidiary SY System Tech, Leoni and Furukawa Electric) with EUR142 million in July 2013. Yazaki suffered the most penalty of EUR125 million, followed by SY System Tech who paid EUR11.05 million, Furukawa Electric EUR4 million and Leoni EUR1.3 million. Sumitomo Electric was exempted from penalty because it reported Cartel monopoly to the European Union.

In 2013, Furukawa Electric performs most actively in the investment in the field of automotive wiring harness. Furukawa Electric acquired Mitsubishi's automotive connector business in late 2011 to increase investment in the field. In March 2013, the factory of Furukawa Electric in the Philippines was put into operation officially. In May 2013, Furukawa Electric decided to expand its Philippine factory whose Phase II is expected to be put into operation in January 2014. At the end of 2014, Furukawa Electric is expected to gain annual sales of JPY12 billion. Meanwhile, it established a new automotive wiring harness plant in Mexico, which started construction in May 2013 and will go into operation in January 2014. In September 2013, the Shenzhen subsidiary set up Wuhan Furukawa Automotive Systems Co., Ltd. in Wuhan, with an investment of RMB100 million.

In 2013, the most prominent change in the automotive wiring harness market lies in the poor performance of large manufacturers and the excellent performance of medium and small manufacturers. Top three players Yazaki, Sumitomo and Delphi offer high and inflexible prices. With the launch of a large number of high-quality automotive connectors, the technical threshold to automotive wiring harness is lowered. Due to the low output, small and medium-sized automotive manufacturers prefer small and medium-sized automotive wiring harness suppliers or self-production to control costs strictly. For example, the automotive wiring harness of Great Wall Motor is supplied by its subsidiary Baoding Mande Auto Parts Co., Ltd.; BYD's supplier is its Fifteenth Division; Geely is supported by Geely Haoda Automotive Electrics.

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 Automotive Market
 - 2.2.1 Status Quo of Passenger Car Market
 - 2.2.2 Commercial Vehicle Market
- 2.3 China Automotive Industry

3 Automotive Wiring Harness Market

- 3.1 Global Automotive Wiring Harness Market
- 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 Manufacturers

- 4.1 Sumitomo Electric
 - 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 Sumitomo Wiring Systems
 - 4.1.8 Huizhou Zhurun Wiring Systems
 - 4.1.9 Sumidense 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
 - 4.2.2 Delphi Packard Electric System Baicheng
 - 4.2.3 Delphi Packard Electric System Guangzhou
 - 4.2.4 Delphi Packard Electric System Yantai
 - 4.2.5 Delphi Packard Electric System Wuhan
 - 4.2.6 Delphi Packard Electric System
- 4.3 Yazaki
 - 4.3.1 Tianjin Yazaki Automotive Parts
 - 4.3.2 Hangzhou Yazaki
 - 4.3.3 Shantou Yazaki
 - 4.3.4 Yantai Yazaki
 - 4.3.5 Foshan Shunde Yazaki Auto Parts
 - 4.3.6 Zhangzhou Yazaki
- 4.4 Leoni
 - 4.4.1 Leoni Electrical Systems Shanghai
 - 4.4.2 Leoni Wiring Systems Changchun
 - 4.4.3 Leoni Wiring Systems Liuzhou
- 4.5 Furukawa Electric
 - 4.5.1 Changchun Furukawa Automotive Wiring Harness
 - 4.5.2 Furukawa Auto Parts (Huizhou)
 - 4.5.3 Furukawa Electric Shenzhen
 - 4.5.4 Furukawa Electric Hongkong
 - 4.5.5 Furukawa Automotive Parts (Dongguan)
- 4.6 Gold Peak Industries

- 4.6.1 Shanghai Jintong Automobile Harness
- 4.7 Lear
 - 4.7.1 Wuhan Lear-DFM Auto Electric
- 4.8 Nantong Unistar Electro-Mechanical Industries
 - 4.8.1 Nantong Unistar Wiring Harness
- 4.9 Kyungshin Industrial
 - 4.9.1 Qingdao Kyungshin Electronic
 - 4.9.2 Jiangsu Kyungshin Electronic
- 4.10 Coroplast
 - 4.10.1 Coroplast Harness Technology (Taicang)
- 4.11 Kunshan Hu Guang Auto Harness
- 4.12 THB
- 4.13 Kromberg & Schubert
- 4.14 Fujikura
 - 4.14.1 Fujikura Zhuhai
 - 4.14.2 Fujikura Changchun
- 4.15 Qingdao Yujin Electro-Circuit Systems
- 4.16 Yura
 - 4.16.1 Beijing Yura
 - 4.16.2 Beijing Yura Sewon ECS
 - 4.16.3 Weihai Yura
 - 4.16.4 Rongcheng Yura Electric
- 4.17 Hefei JAC Xinfu
- 4.18 PKC

- Global Light Vehicle Output, 2011-2014E
- Global Heavy Vehicle Output, 2011-2014E
- Sales Volume of Major Global Automobile Brands, 2010-2012
- China's Automobile Output, 2001-2013
- YoY Growth Rate of Annual Output of Various Vehicles in China, 2008-Oct 2013
- China's Monthly Passenger Car Sales Volume and Growth Rate, Jan 2012-Oct 2013
- China's Passenger Car Sales Volume by Model
- Sales Volume of Audi, BMW and Mercedes-Benz in China, Jan 2011-Oct 2013
- China's Passenger Car Sales Volume by Country, 2009-Oct 2013
- China's Monthly Medium and Heavy Truck Sales Volume, Jan 2011-Oct 2013
- China's Monthly Light Truck Sales Volume, Jan 2011-Oct 2013
- China's Monthly Mini truck Sales Volume, Jan 2011-Oct 2013
- China's Monthly Large Bus Sales Volume, Jan 2011-Oct 2013
- China's Monthly Medium Bus Sales Volume, Jan 2011-Oct 2013
- China's Monthly Small Bus Sales Volume, Jan 2011-Oct 2013
- Global Automotive Wiring Harness Market Size, 2007-2014E
- Market Share of Major Global Manufacturers of Automotive Wiring Harness, 2011
- Market Share of Major Global Manufacturers of Automotive Wiring Harness, 2012
- Global Output Value of Automotive Wiring Harness by Region, 2009
- Market Share of Major Manufacturers of Automotive Wiring Harness in China (by Shipment), 2013
- Market Share of Major Manufacturers of Automotive Wiring Harness in China (by Value), 2013
- Major Small and Medium Manufacturers of Automotive Wiring Harness in China
- Output Value of Automotive Wiring Harness in China by Region, 2009-2012
- Automotive Wiring Harness Export in China by Region, 2003-2008
- Revenue and Operating Margin of Sumitomo Electric, FY2005-FY2014E

- Revenue of Sumitomo Electric by Product, FY2009-FY2014E
- Automotive Wiring Harness Revenue of Sumitomo Electric, FY2011-FY2014E
- Automobile Revenue of Sumitomo Electric by Region, FY2012
- Revenue and Operating Margin of Tianjin Jin-Zhu Wiring Systems, 2006-2011
- Financial Status of Fujian JK Wiring Systems, 2012-H1 2013
- Delphi's Revenue and Gross Margin, 2004-2013
- Delphi's Revenue and Operating Margin, 2007-2013
- Delphi's Revenue and EBITDA Rate, 2007-2013
- Delphi's Revenue by Product, 2009-Q3 2013
- Delphi's EBITDA by Division, 2010-Q3 2013
- Delphi's Client Distribution, 2010-2013
- Delphi's Revenue by Region, 2010-2013
- Delphi's Property by Region, 2010-2011
- Yazaki's Number of Employees by Region, FY2011-FY2012
- Yazaki's Revenue, FY2006-FY2013
- Yazaki's Revenue by Region, FY2011-FY2013
- Revenue of Leoni Wiring Systems, 1996-2016E
- Revenue and EBIT of Leoni Wiring Systems, 2005-2013
- Revenue of Leoni Wiring Systems by Region, 2011
- Revenue of Leoni Wiring Systems by Region, 2012
- Revenue of Leoni Wiring Systems by Region, 2013
- Revenue of Leoni Wiring Systems, 1996-2013
- Revenue and EBIT of Leoni Wiring Systems, 2005-2013
- Revenue of Leoni Wiring Systems by Client, 2012
- Number of Employees of Leoni Wiring Systems, 2005-2011

- Number of Employees of Leoni Wiring Systems by Region, end of Sep 2012
- Revenue and EBIT of Leoni Wiring Systems, Q1 2011-Q3 2013
- Global Distribution of Leoni Wiring Systems
- Clients of Leoni Wiring Systems
- Client Distribution of Leoni Wiring Systems, 2009
- Client Structure of Leoni Wiring Systems, 2010
- Clients of Leoni Wiring Systems, 2011
- Number of Employees of Leoni Wiring Systems by Region, 2011
- Revenue of LEONI's Wire & Cable Division, 1996-2013
- Revenue of LEONI's Wire & Cable Division by Application, 2009-2012
- Revenue and Output of Huizhou Furukawa Automotive Parts, 1995-2011
- Organizational Structure of Gold Peak Industries
- LEAR's Revenue by Region, 2010
- LEAR's Revenue by Region, 2011
- LEAR's Revenue by Region, 2012/ 2013
- LEAR's Revenue by Client, 2010
- LEAR's Revenue by Client, 2011
- LEAR's Revenue by Client, 2012
- LEAR's Revenue in China, 2007-2012
- Main Products of LEAR's EPMS Division
- Revenue and Operating Margin of Kyungshin Industrial, 2004-2013
- THB's Revenue by Product, 2008-2011
- THB's Balance Sheet, by end of 2011
- Client Structure of Kromberg & Schubert
- Main Vehicle Models Supported by Kromberg & Schubert

- Fujikura's Revenue and Operating Margin, FY2004-FY2014E
- Fujikura's Revenue by Division, FY2008-FY2013
- Fujikura's Revenue by Product, FY2013-FY2014E
- Fujikura's Operating Income by Division, FY2007-FY2013
- Fujikura's Electronic System Revenue by Product, FY2008-FY2013
- Global Distribution of Fujikura's Automotive Product Business
- YURA's Corporate Structure
- YURA's Revenue and Net Income, 2007-2013
- YURA's Revenue by Product, 2009-2013
- YURA's Global Distribution
- YURA's Global Capacity Distribution
- YURA's Output, 2006-2011
- PKC's Global Distribution
- PKC's Number of Employees by Region, by end of 2011
- PKC's Sales and Operating Margin, 2005-2013
- PKC's EBITDA, Q1 2012-Q3 2013
- PKC's Net Working Capital, Q1 2011-Q3 2013
- PKC's Cash Flow, 2011-2013
- AEES' Sales by Product, 2010
- AEES' Sales by Region, 2010
- Sales of PKC and AEES by Product, 2010
- Sales of PKC and AEES by Region, 2010
- PKC's Quarterly Wiring Harness Revenue and EBIT, Q1 2010-Q3 2012
- PKC's Global Market Share, 2012
- PKC's Global Market Share, 2013

Selected Charts



- PKC's Revenue by Region, Q3 2012
- PKC's Revenue by Region, Q3 2013

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