



China Relay Industry Report, 2015-2018

Sep. 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

China is the key production base of relays in the world, with its output holding more than 50% of global total. Driven by the expanding demand from downstream markets, China's relay sales and output reported RMB18.5 billion and about 6.79 billion units separately in 2014, when home appliance relay and automotive relay, as the main categories in Chinese relay market, swept shares of 30% and 18.7% respectively.

Presently, the high-end relay market in China is principally monopolized by foreign brands such as Omron, Panasonic and TE Connectivity, while the low-end market is controlled by local Chinese players like Hongfa Technology, Dongguan Sanyou Electrical Appliances, Zhejiang HKE, Ningbo Forward Relay, and Guizhou Space Appliance.

As the leader in Chinese relay industry, Hongfa Technology boasts annual capacity of producing one billion relays, occupying an 8.9% share of global relay market and ranking the fourth, and accounting for 19.2% share of Chinese relay market and ranking the first in 2014. In May, 2015, Hongfa Holding, a sub-subsidiary of Hongfa Technology invested USD20 million to acquire CLODI's patents, trademarks and 100% equities of KG Company (held by CLODI), through which Hongfa further consolidated its position in the world's market.

Dongguan Sanyou Electrical Appliances is one of the top 100 enterprises in China electronic components industry, ranking the 44th in 2014. The company's products, without exception, have passed UL, CUL and CQC certifications and can meet the requirements of EU's ROHS and REACH, and part of products even gained German VDE and TUV accreditations. It boasts annual production capacity of 600 million relays. In 2014, the company's revenue reached RMB850.7 million, making up 4.6% share of Chinese relay market.

Ningbo Forward Relay is an export-oriented relay manufacturing enterprise, exporting 70% of its products to foreign countries and possessing annual capacity of producing 150 million relays. In 2014, the company's revenue hit RMB433.5 million, being the 71st among top 100 players in China's electronic components industry, and taking a 2.3% share of Chinese relay market.

Guizhou Space Appliance is the listed company under China Aerospace Science & Industry Corp (CASIC) and also the leading enterprise in military relay field. In 2014, the company's relay output and sales volume was up to 12.03 million units and 11.66 million units respectively, harvesting the revenue of RMB188 million, a share of 11.7% in total revenue and accounting for 1% share of Chinese relay market.

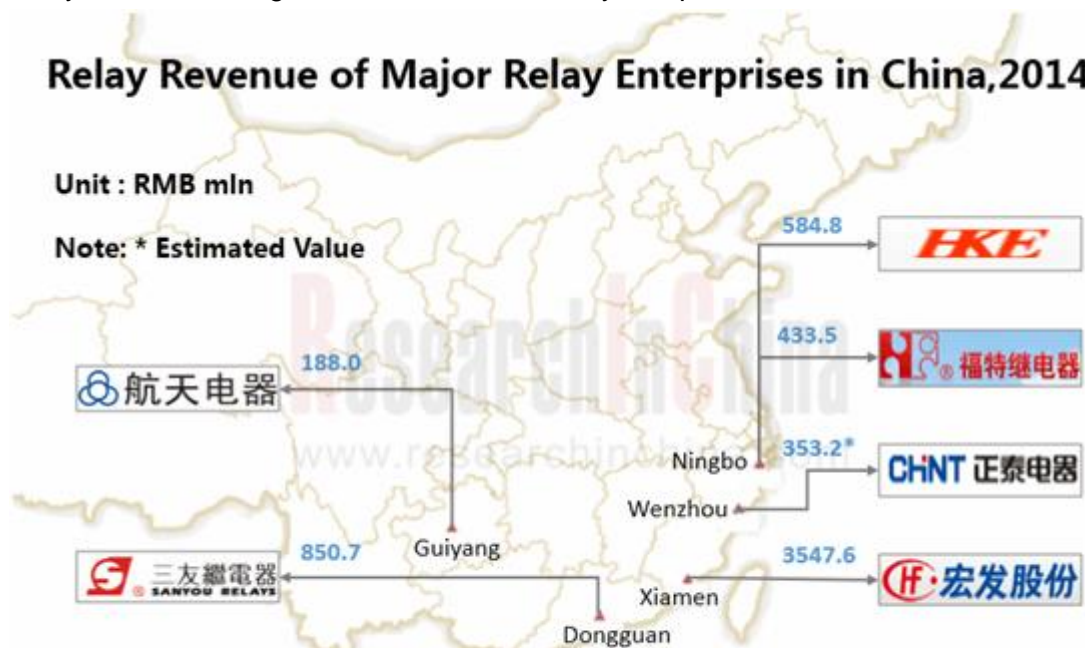
This report highlights the followings:

- Overview of global relay industry, covering market size, market structure, competitive landscape, etc.;
- Overview of China relay industry, such as market size, market structure, import & export, competition pattern, etc.;
- Downstream sectors of China relay industry, such as home appliance, automobile, etc.;
- Operation and relay business of 5 global and 8 Chinese relay companies.

Relay Revenue of Major Relay Enterprises in China, 2014

Unit : RMB mln

Note: * Estimated Value



Source: China Relay Industry Report, 2015-2018 by ResearchInChina

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