



Global and China Automotive Wiring Harness Industry Report, 2015

Jan. 2016

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, 2015 highlights the followings:

1. Global and China automobile market and industry
2. Downstream market of automotive wiring harness industry
4. Automotive wiring harness industry and market
5. 18 automotive wiring harness companies

In 2015, as the global economic deflation became more obvious, the prices for major commodities such as copper continued to drop, a situation that resulted in a fall in costs and prices of wiring harness. Meanwhile, the Japanese yen and the euro tumbled. In December 2015, the Federal Reserve raised interest rates, and Europe is still likely to expand its programme of quantitative easing, which would cause the yen and the euro to continue to depreciate, thus leading to a decline in automotive wiring harness market.

It is projected the global automotive wiring harness market would slide by 7% to USD39.721 billion in 2015, and to USD39.008 billion in 2016. By 2017, the market is expected to rebound to USD40.162 billion.

There are two hot topics in automotive wiring harness market: aluminum wire and high-voltage wiring harness in xEV. Sumitomo and Furukawa Electric are quite successful in automotive aluminum wire harness. Aluminum wire harness could reduce the mass of vehicles, but aluminum wire and copper alloy connector are two different kinds of metal and thus should be subject to special treatment and require special connectors.

In recent years, the xEV output has increased significantly. xEV needs to use a large quantity of high-voltage high-current wiring harness which has to be customized. While most of the companies have lower xEV output, and few ones are willing to customize wiring harness products, which provides opportunities to small companies. For example, Taiwan-based Bizlink exclusively supplies high-voltage wiring harness to Tesla. However, once the output increases, those companies are likely to transfer their orders to professional wiring harness companies.

Ranking of Major Global Automotive Wiring Harness Companies by Revenue, 2009-2015

USD mln	2009	2010	2011	2012	2013	2014	2015
SUMITOMO ELECTRIC	6,384	7,974	8,958	9,980	9,661	10,579	8,989
YAZAKI	7,548	9,808	11,236	12,220	11,720	12,092	11,390
DELPHI	3,022	4,330	5,117	5,286	6,024	6,516	6,300
LEONI	1,531	2,166	2,688	2,824	3,035	3,190	3,037
FURUKAWA ELECTRIC	914	940	980	1,127	1,350	1,308	1,173
LEAR	1,090	1,448	1,819	1,810	2,170	2,453	2,552
Coroplast	400	412	408	360	330	302	270
FUJIKURA	656	753	899	1,097	1,150	1,230	1,170
YURA	860	1,145	1,150	1,208	1,360	1,408	1,450
Kromberg & Schubert	350	370	418	410	400	430	390
PKC	263	419	635	1,199	1,174	1,027	940
Others	1,518	1,506	1,638	2,008	2,260	2,180	2,060

Source: Global and China Automotive Wiring Harness Industry Report, 2015 by

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1 Global and Chinese Automotive Market

- 1.1 Global Automotive Market
- 1.2 China Automotive Industry Overview
- 1.3 Recent Development of China Automotive Market

2 Automotive Wiring Harness Industry

- 2.1 Overview
- 2.2 Characteristics

3. Automotive Wiring Harness Market and Industry

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 - 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
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