

**Global and China Automotive Wiring  
Harness, Connector and Cable  
Industry Report, 2019**

**Sep. 2019**

## 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 wiring harness companies worldwide can be divided into four echelons. The first-echelon players are just Yazaki and Sumitomo Electric Industries, each earning more than \$10 billion a year, wherein Yazaki grows in an endogenous way and Sumitomo Electric Industries expands by collaborations and mergers and acquisitions.

MSSL, a joint venture of Sumitomo Wiring Systems (SWS), a subsidiary of Sumitomo Electric Industries, and India's Samvardhana Motherson, has staged acquisitions in wiring harness field: in 2014, MSSL acquired the US-based Stoneridge for \$67.5 million; in 2017, MSSL bought shares of PKC, a Finnish commercial vehicle wiring harness manufacturer for €570 million; MSSL means to acquire LEONI, a German company that is in a tight corner recently, and if the deal is done, Sumitomo Group will overtake Yazaki as the world's biggest wiring harness producer in terms of revenue.

The second-echelon players are typically Aptiv, LEONI and Lear. Lear, a company that mainly operates automotive seating systems, a kind of business contributing over 75% revenue, will be likely to make its Electrical Division an independent business or sell it to others.

The third-echelon players include Kyungshin Industrial, Draexlmaier, Kromberg & Schubert, Furukawa Electric, YURA and Fujikura. Kyungshin Industrial is a joint venture of South Korea's Kyungshin Co., Ltd. and Sumitomo Electric Industries. Players in the fourth echelon are a number of small wiring harness firms.

**Ranking of Global Automotive Wiring Harness Manufacturers by Revenue, 2018 & 2019E (USD bn)**

Company	2018	2019 E	Country
Yazaki	15.3	15.5	Japan
Aptiv	5.8	6.0	USA
Sumitomo Electric Industries	11.5	11.8	Japan
LEONI	3.5	3.3	Germany
Lear	3.4	3.1	USA
Kyungshin Industrial	2.1	2.0	Japan-South Korea JV
Draexlmaier	1.5	1.4	Germany
Kromberg & Schubert	1.5	1.5	Germany
Furukawa Electric	1.5	1.5	Japan
PKC	1.4	1.5	India
YURA	1.0	0.9	South Korea
Fujikura	0.9	0.8	Japan
MSSL	0.8	0.7	India

In 2018, global automotive connector market was worth roughly \$17.8 billion (value per vehicle was around \$193 on average, in comparison with an average of \$169 in 2017). That was because large manufacturers raised their prices latter than cooper price rose in 2017 and new energy vehicle sales surged. Connector value per new energy vehicle averages at \$500 to \$800. In particular, considering safety much at an early stage of designing their new energy vehicles where they lack experience, OEMs often try to use many an expensive connector. The more experienced an OEM is, the less high voltage wiring harnesses and connectors it will use. What's more, a vehicle tends to use more connectors, for adding a hardware capability needs almost several or even more than a dozen connectors. That's the main stimulus to the expansion of the automotive connector market in future.

**Ranking of Global Automotive Connector Manufacturers by Revenue, 2018 & 2019E**

(USD mln)	2018	2019E	Country
TE	6,090	5,720	United States
Aptiv	3,180	3,310	United States
Yazaki	2,010	1,920	Japan
Amphenol	1,480	1,700	United States
Sumitomo	1,090	1,200	Japan
JAE	680	650	Japan
AVX/ELCO	650	620	Japan
KET	550	510	South Korea
JST	320	350	Japan
Rosenberger	330	350	Germany
Molex	300	301	United States

Yet OEMs are trying to reduce the use of connectors as well. In 2019, automotive connector market will expectedly increase by a tiny 0.6% over the previous year and reach \$18.5 billion, as lower automobile sales led to a slump in revenue of the bellwether TE Connectivity. On one estimate, as a rise in global automobile sales comes with a swarm of new connector entrants in BEV market, automotive connector market may grow by 3.9% in 2020, predictably being valued at \$23.6 billion in 2024.

Big wiring harness vendors like Yazaki, Sumitomo, Fujikura, Furukawa, YURA, Aptiv and LEONI, are capable of making cables, especially Japanese companies all of which boast large capacities, state-of-the-art technologies and copper mines. Also, they can produce high voltage cables for new energy vehicles.

## Global Automotive Cable TOP12 by Revenue, 2018

Company	Revenue (USD mln)
Sumitomo Electric Industries	2,060
Yazaki	1,520
Coficab	1,430
LEONI	1,360
Aptiv	910
Prysmian	660
Beijing Force Automotive Wire	290
ACOME	230
Coroplast	220
Champlain	140
Ningbo KBE Electrical Technology	130
HUBER+SUHNER	120

**1 Automotive Wiring Harness & Connector Market**

- 1.1 Global Automobile Market
- 1.2 Chinese Automobile Market
- 1.3 Global New Energy Vehicle Market
- 1.4 Chinese New Energy Vehicle Market
- 1.5 Chinese New Energy Passenger Car Market Pattern
- 1.6 Chinese New Energy Commercial Vehicle Market Pattern
- 1.7 Global Automotive Wiring Harness & Connector Market
- 1.8 Chinese Automotive Wiring Harness & Connector Market
- 1.9 Global New Energy Vehicle High Voltage Wiring Harness & Connector Market Segments
- 1.10 Chinese New Energy Vehicle High Voltage Wiring Harness & Connector Market Segments

**2 Automotive Wiring Harness & Connector Industry Pattern**

- 2.1 Ranking of Global Automotive Wiring Harness Manufacturers by Revenue, 2018 & 2019E
- 2.2 Global New Energy Vehicle High Voltage Wiring Harness Industry Pattern
- 2.3 Global New Energy Vehicle High Voltage Connector Industry Pattern
- 2.4 Chinese Automotive Wiring Harness Industry Pattern
- 2.5 Chinese New Energy Vehicle High Voltage Wiring Harness & Connector Market Pattern
- 2.6 Global Automotive Cable Industry Pattern
- 2.7 Relationships between New Energy Vehicle High Voltage Wiring Harness/Connector Suppliers and Automakers in China

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- 3.1 New Energy Vehicle Connector Standards
- 3.2 New Energy Vehicle High Voltage Connector Design
  - 3.2.1 Heavy Current Contact Design
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**4 Automotive Wiring Harness & Connector Manufacturers**

- 4.1 Aptiv
- 4.2 Sumitomo Electric Industries
- 4.3 BizLink
- 4.4 Lear
- 4.5 Shanghai Jintong Automobile Harness Limited (Jiangsu Etern)
- 4.6 Yazaki
- 4.7 Furukawa
- 4.8 Fujikura
- 4.9 LEONI

- 4.10 Draexlmaier
- 4.11 Kunshan Huguang Auto Electric Co., Ltd.
- 4.12 Kromberg & Schubert
- 4.13 Nexans
- 4.14 Shenzhen Deren Electronic Co., Ltd.
- 4.15 Yura
- 4.16 Kyngshin Industrial
- 4.17 HaoDa Auto Parts (Zhejiang) Co., Ltd.
- 4.18 Tianhai Auto Electronics Group Co., Ltd.
- 4.19 Changchun Sanzhi Auto Parts Co., Ltd.
- 4.20 Auto-Kabel
- 4.21 Shenzhen Qiaoyun Technology Co., Ltd.
- 4.22 Tianjin Great Wall Jingyi Auto Parts Co., Ltd.
- 4.23 Samvardhana Motherson Group
- 4.24 MD Elektronik
- 4.25 Prettl
- 4.26 Forschner

### **5 Automotive Connector Manufacturers**


- 5.1 Amphenol
- 5.2 Hu Lane Associate
- 5.3 Rosenberger
- 5.4 JAE
- 5.5 TE Connectivity
- 5.6 Nanjing Kangni Mechanical & Electrical Co., Ltd.

- 5.7 Sichuan Yonggui Technology Co., Ltd.
- 5.8 AVIC Jonhon Optron Technology Co., Ltd.
- 5.9 Luxshare Precision Industry Co., Ltd.
- 5.10 JST


### **6 Automotive Cable Manufacturers**

- 6.1 Ningbo KBE Electrical Technology Co., Ltd.
- 6.2 Beijing Force Automotive Wire Co., Ltd.
- 6.3 Jiangsu Hengtong New Energy Intelligent Control Technology Co., Ltd.
- 6.4 COFICAB
- 6.5 Coroplast
- 6.6 Draka (Prysmian)
- 6.7 HUBER+SUHNER






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Electric Vehicle Connector Revenue and Gross Margin of Sichuan Yonggui, 2015-2019

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Luxshare's Revenue by Product, 2016-2021E

Luxshare's Automotive Product Revenue, 2016-2021E

JST's Revenue by Application, FY2019

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Customers of Ningbo KBE, 2018-2019

Ranking of Global New Energy Vehicles by Sales, 2018

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Aptiv's Financial Statement, 2014-2018

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Yazaki's Revenue by Region, FY2016-FY2018

Furukawa's Revenue and Operating Income, FY2014-FY2019

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