

Global and China Automotive Connector Industry Report, 2014-2015

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Abstracts

Global and China Automotive Connector Industry Report, 2014-2015 contains the followings:

1. Overview of Global and Chinese Automotive Market
2. Analysis on Automotive Connector Industry and Market
3. Research on 13 Major Automotive Connector Companies

As the most potential segment in the connector industry, automotive connectors will trigger the market value of USD12.7 billion (up 5.3% from 2013) in 2014, whilst the global connector market is expected to hit USD50.2 billion (representing a slight increase of 2.6% compared with 2013). The growth of the automotive connector market is attributed to: First, the intensified automotive electronization (especially PEVs and PHEVs) generates more demand for connectors. Second, Chinese and American automotive markets grow strongly, particularly luxury cars and SUVs featured with higher electronization degree and higher requirements on quality grow aggressively.

Although the Chinese sedan market underperforms, the SUV market has maintained the growth rate of more than 40% and the luxury car market has also performed well. In 2015, the global automotive connector market is expected to grow 3.5% and reach USD13.1 billion; the overall connector market is expected to grow slightly by 2.2%.

Automotive connector companies can be divided into three types, namely versatile connector companies, automotive wiring harness companies and professional automotive connector companies. Although covering a broad business scope, numerous versatile connector companies lack growth potentials. Automotive wiring harness companies and professional automotive connector companies have more

potentials and high profitability. For example, Taiwan Hu Lane Associate mainly serves BYD, Changan Automobile and Great Wall Motors, and has entered the supply chain of Shanghai GM successfully recently. The gross margin of Hu Lane Associate always remains at above 40% and its operating margin has seen growth for consecutive five years, which large companies even can not compare with. Hu Lane Associate not only maintains stable performance, but also absorbs new customers every year.

Three automotive wiring harness giants are strengthening connector business. Japanese companies are trying to improve their supply capacity, while American and European counterparts are acquiring small firms actively. Delphi acquired FCI's MVL Division in 2012, and took over North America's largest automotive window connector company – Antaya in September 2014.

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