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Global and China Electronic Cable Assembly Industry Report, 2014

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Abstracts

Global and China Electronic Cable Assembly Industry Report, 2014 contains the following aspects:

1. Brief introduction to electronic cable assembly
2. Background of electronic cable assembly industry
3. Analysis on electronic cable assembly market and industry
4. Research on 24 electronic cable assembly companies

Electronic cable assembly is divided into internal and external ones. Internal electronic cable assembly is mostly available in the OEM market, while external electronic cable assembly can be found in OEM and retail markets. According to application, electronic cable assembly falls into data cable assembly, high-speed cable assembly and traditional cable assembly. High-speed cable assembly complies with USB 3.0 / 3.1, HDMI, DisplayPort, MHL, Thunderbolt, HD-SDI, DockPort and SlimPort standards. Traditional cable assembly accords with RF Coaxial, Composite Video, S-Video, Y / Pb / Pr, VGA (D-Sub), DVI, IEEE 1394, BNC, USB 2.0 and Audio RCA standards.

As the electronic cable assembly industry features with labor-intensive, the vast majority of enterprises are concentrated in Mainland China. Currently, the industry has two business models. First is traditional OEM. Brand companies or complete machine companies commission OEMs to produce products. Essentially, these OEMs are their affiliates without independence. Second is OEM serving American and European retail channels, mainly e-business channels. In China, these OEMs are entitled to sell products under their own brands by e-business channels mostly. Compared with the first model, the OEMs in the second model enjoy strong independence, have a large number of scattered customers, show low dependence on downstream customers, and

target the terminal retail market, so they can be regarded as independent electronic cable assembly companies.

Compared to independent electronic cable assembly companies, traditional electronic cable assembly companies mainly serve complete machine companies, brand companies or the first-tier suppliers of brand companies, more than 30% of their revenue comes from the largest customer and 75% from the top five customers. The over-reliance of traditional electronic cable assembly companies on a single large customer implies great risks, namely their performance will collapse once the customer cancels orders. Meanwhile, traditional companies have to invest considerable costs in maintaining relationship with large customers. Due to the unequal status, traditional companies can't avoid signing unequal contracts with customers usually; once something is wrong with products, they may confront with huge claims of large customers, which is likely to make them go bankrupt. Independent electronic cable assembly companies and customers are equal in status. Thanks to abundant clients, independent electronic cable assembly companies are not dependent on a single large customer. In addition, independent companies provide up to 10,000 types of products, much more than traditional companies who can only offer dozens or hundreds of types, so the former need strong management capabilities, flexible production line design and production arrangements.

The internal electronic cable assembly market is primarily reflected in the laptop computer field. However, the laptop computer market has been shrinking in recent years. The simplified laptop design (for example, ODD and PCMCIA are removed) requires fewer internal connecting wires; meanwhile, FPC replaces cable assembly partly for the sake of thin and light laptops. The above reasons cause the internal electronic cable assembly market to contract dramatically, so that related companies have suffered losses for several consecutive years. The only bright spot is the popularity of EDP cable assembly incurred by the fast-growing resolution of laptop computers.

On the contrary, the external electronic cable assembly market is booming, mainly propelled by the following driving forces. Firstly, the significant emergence of smartphones. Smartphones consume much power, so users must consider the charging issue in a variety of occasions and they need data cables at home, in offices or cars, or on trip. For convenience, they must purchase many data cables. In general, a consumer will get a data cable for free when he buys a smartphone, but he still needs to purchase at least another one to meet demand. This case was not seen before.

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Secondly, consumer electronic products are featured thin shape and light weight, especially thin. In order to reduce the thickness of products, companies make a lot of efforts in terms of the interface height for external terminals, especially Apple whose products include Mini-DP, Mini-HDMI, Micro-HDMI, Micro-USB, Mini-USB and Lightning. The connection between these products and external devices requires special cables.

Thirdly, the arising of numerous high-definition devices and 1080P video sources has spawned a sizeable HDMI and DisplayPort cable assembly retail market.

Finally, every major change in the interface will strongly stimulate the market to grow. For example, the market surge in 2013 was mainly attributed to Apple’s Lightning interface. In 2016, Type C USB and Thunderbolt interface will prompt the market dramatically; especially Type C USB is expected to replace the traditional Micro USB interface in large scale, which will bring a huge market.

The external electronic cable assembly market size approximates USD7.2 billion in 2014, and is expected to hit USD8.3 billion in 2015 with an increase of 15.3%, and USD10.6 billion in 2016 with a growth rate of 27.7%.

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