

# Global and China Wiring Harness Industry Report, 2012

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## Abstracts

The global automotive wiring harness market size was USD 24.3 billion in 2009, and rebounded strongly in 2010, especially in China. In addition, the soaring copper price has also expanded the market size, to USD 31.6 billion in 2010, up 29.9% year on year. In 2011, the copper price continued to rise, and the application of automotive electronics also increased the market size of wiring harness.

In 2012, driven by the demand from North America, Japan and xEV market, the wiring harness market scaled USD 40.1 billion, a year-on-year growth of 9.7%. It's expected that the market growth will slow down in 2013, and the copper price will also fall slightly.

Japanese manufacturers are big winners in the automotive wiring harness market in 2012, while American and European manufacturers lag far behind. The gap between the No.1 Yazaki and No.2 Sumitomo Electric has increased. Yazaki acquired a Russian wiring harness enterprise in mid 2012, and made Tata Yazaki Autocomp as its wholly owned subsidiary in November 2012 by acquiring 50% stake held by Tata.

Due to the devotion to the Asia-Pacific market, Delphi lost its North America market, which was seized by Japanese enterprises. As the North America market performed much better than the Asia-Pacific market (especially the Chinese mainland market), thus Delphi suffered a rare decline. However, Delphi performed well in the Chinese mainland market and further consolidated its championship in the Chinese mainland market. Lear encountered the same situation, but the performance basically remained flat with a year earlier.

Japanese manufacturers have benefited from the recovery of the Japanese market. The market base in 2011 was low due to the impact from the earthquake, and rebounded

strongly in 2012. The annual output in 2012 is expected to grow by 18% year on year, the highest in the world.

Small plants in Europe are underperforming, primarily due to the economic downturn in Europe. Chinese mainland enterprises have also witnessed decline for two consecutive years due to the decreasing sales volume of domestic automobile. Benefitting from the commercial vehicle market outburst in USA and the acquisition of AEES in 2011, PKC has improved its performance significantly. The performance of small and medium-sized manufacturers has declined significantly subjected to the continuous suppression from large manufacturers.

Since 2011, China's automotive wiring harness industry has been migrating towards the inland, and most companies have transferred capacity to Chengdu, Chongqing and Wuhan. Delphi set up Chengdu base in June 2011, which was officially put into production in September 2012; it started the construction of Chongqing base in October 2012, which is expected to be put into production in June 2013. Yazaki set up a base in Xiaogan, Hubei in June 2011, which started commission in May 2012. LEONI completed the acquisition of Daekyeung at the end of 2011, obtaining the latter's three production bases in Jining, Penglai and Qingdao. Lear's Wuhan base set up Chongqing branch in 2003, which delivered remarkable performance in 2012 and increased the revenue of Lear Wuhan by nearly 50%. South Korean Yura started the construction of bases in Baoding of Hebei and Heze of Shandong in 2011, which started production in 2012.

In 2012, Yazaki bases in China grew rapidly, especially the Yantai and Zhangzhou bases. Yantai Yazaki is mainly engaged in export business, and its annual revenue is expected to increase from RMB 1,252 million in 2011 to RMB 2,210 million. The revenue of Zhangzhou Yazaki is expected to increase from RMB 403 million in 2011 to RMB 750 million.

## Contents

### **1. GLOBAL AND CHINA AUTOMOTIVE MARKET AND INDUSTRY**

- 1.1 Global Automotive Market
- 1.2 Global Automotive Industry

### **2. CHINA AUTOMOTIVE MARKET**

- 2.1 Overview
- 2.2 Passenger Car Market
- 2.3 Passenger Car Market Structure
- 2.4 Commercial Vehicle Market
- 2.5 China Automotive Industry

### **3. AUTOMOTIVE WIRING HARNESS MARKET AND INDUSTRY**

- 3.1 Global Automotive Wiring Harness Market
- 3.2 China Automotive Wiring Harness Market
- 3.3 Global Automotive Wiring Harness Industry Pattern
- 3.4 China Automotive Wiring Harness Industry Pattern

### **4. AUTOMOTIVE WIRING HARNESS COMPANIES**

- 4.1 Sumitomo Electric Industries
  - 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 Zhucheng Wiring Systems
  - 4.1.8 Huizhou Zhurun Wiring Systems
  - 4.1.9 Sumidenso 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 Parts
  - 4.3.3 Shantou Yazaki
  - 4.3.4 Yantai Yazaki Automotive Parts
  - 4.3.5 Foshan Shunde Yazaki Auto Parts
  - 4.3.6 Zhangzhou Yazaki Auto Parts
- 4.4 LEONI
  - 4.4.1 LEONI Electrical Systems (Shanghai)
  - 4.4.2 LEONI Wiring Systems (Changchun)
  - 4.4.3 LEONI Wiring Systems Liuzhou
- 4.5 Furukawa Electric
  - 4.5.1 Changchun Furukawa Automobile Harness
  - 4.5.2 Furukawa Auto Parts (Huizhou)
  - 4.5.3 Furukawa Electric (Shenzhen)
  - 4.5.4 Furukawa Electric (Hong Kong)
  - 4.5.5 Furukawa Automotive Parts (Dongguan)
- 4.6 Gold Peak Industries
  - 4.6.1 Shanghai Jinting Automobile Harness
- 4.7 Lear
  - 4.7.1 Wuhan Lear-DFM Auto Electric
- 4.8 Nantong Unistar Electro-Mechanical Industries
  - 4.8.1 Nantong Unistar Wiring Harness
- 4.9 Kyungshin Industrial
  - 4.9.1 Qingdao Kyungshin Electronic
  - 4.9.2 Jiangsu Kyungshin Electronic
- 4.10 Coroplast
  - 4.10.1 Coroplast Harness Technology (Taicang)
- 4.11 KunShan Hu Guang Auto Harness
- 4.12 THB
- 4.13 Kromberg & Schubert
- 4.14 Fujikura
  - 4.14.1 Fujikura Zhuhai
  - 4.14.2 Fujikura Changchun
- 4.15 Qingdao Yujin Electro-Circuit Systems

4.16 Yura

4.16.1 Beijing Yura

4.16.2 Beijing Shiyuan ECS

4.16.3 Weihai Shiyuan Electric Equipment

4.16.4 Rongcheng Yura

4.17 Hefei Jianghuai Xinfu Automobile

4.18 Hu Lane Associate

4.19 PKC

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