

Research Report on Automobile Wiring Harness Industry in China, 2014-2018

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Abstracts

A wiring harness is an assembly of cables or wires which transmit signals or electrical power.

Voltage drop and electromagnetic compatibility (EMC) are two critical features of automobile wiring harness. EU requires that the content of 6 substances including lead, mercury and cadmium in automobile wiring harness must fall into RoHS compliance.

Major auto manufacturers usually maintain close and stable cooperation with professional manufacturers of wiring harness for it is a critical spare part that affects electrical performance of the whole vehicle. The global market of auto wiring harness is monopolized by 4 major manufacturers that take over 75% of the market shares. Most manufacturers in Japan inherit fine techniques from cable production in the past. In addition, enterprises like Sumitomo Group can reduce costs by taking advantage of existing upstream mineral resources.

Yazaki Corporation and Sumitomo Group started to develop dedicated high voltage (HV) wiring harness for auto manufacturers in Japan in the 1980s. In the 1990s, Delphi initiated the development of HV wiring harness for General Motors (GM). The integrated production system of HV wiring harness in Japan and the U.S. is constantly testified and improved in practice.

As the leading enterprise of connectors in China, Shenzhen Deren Electronic Co., Ltd. purchased the auto connector and wiring harness business of CAEG, a listed enterprise in Singapore, and became the share holder of THB Group in 2012. As the largest manufacturer of auto wiring harness and connectors in China, THB Group provides wiring harness for FAW-Volkswagen Automobile Co. Ltd., Shanghai GM and numerous

domestic auto manufacturers. Meanwhile, Shenzhen Gaorun Science and Technology Co., Ltd., jointly established by Shenzhen Deren Electronic Co., Ltd. and Kromberg & Schubert Group, entered the high-end market of auto wiring harness. Kromberg & Schubert Group is one of Germany's largest manufacturers of auto wiring harness as well as the supplier for German auto manufacturers such as Volkswagen and BMW.

The production volume of vehicles was 22.1168 million in China in 2013. According to CRI, the demand for auto wiring harness exceeded 1.4 billion while the market size surpassed USD 10 billion.

Special processing in aspects of transport capacity, mechanical strength, insulation protection and electromagnetic compatibility leads to a 25%-50% increase in the production cost of HV wiring harness in new energy vehicles compared with that in traditional vehicles. Therefore, the purchasing cost of wiring harness in new energy vehicles increases by 20%-40% compared with that in traditional vehicles.

It is estimated that China will remain the fastest growing economy in the world in the coming years. Therefore, the production volume of vehicles will continue to rise while that of new energy vehicles exhibits strong momentum for growth.

Through this report, the readers can acquire the following information:

Development Environment of Automobile Wiring Harness Industry in China

Supply and Demand Status of Automobile Wiring Harness Industry in China

Major Manufacturers of Automobile Wiring Harness

Competition in Automobile Wiring Harness Market in China

Import and Export Status of Automobile Wiring Harness

Prospect of Automobile Wiring Harness Industry in China

The following enterprises and people are recommended to purchase this report:

Manufacturers and Trading Enterprises of Auto Accessories

Manufacturers of Whole Vehicles

Investors/Research Institutes Concerned About Automobile Industry

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