

Automotive Wiring Harness Market to Surpass USD 72.03 Billion by 2032 Owing to Rising Demand for ADAS and EV Adoption

The Automotive Wiring Harness Market is poised for significant growth, driven by the rapid adoption of ADAS and the increasing electrification of vehicles

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[Global Automotive Wiring Harness Market](#)



The Automotive Wiring Harness Market was USD 51.05 billion in 2023 and is expected to reach USD 72.03 billion by 2032, growing at a CAGR of 3.9% over the forecast period of 2024-2032.

Automotive Wiring Harness Market Expands Driven by ADAS Integration and Growing Electric Vehicle Demand.

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The Automotive Wiring Harness Market is driven by EV adoption, ADAS, and connected vehicles. Growing demand for lightweight, high-performance wiring offers lucrative opportunities”

SNS Insider

The demand for safety features is rising rapidly in passenger cars, with over 65% of all vehicles expected to have some form of ADAS by 2025. This in turn calls for highly sophisticated wiring harnesses which need to connect various sensors and control units. Another significant market driver is the surging interest in EVs, which see as much as 40% more wiring than traditional cars. As the governments emphasize electrification to curb carbon emissions, EVs will comprise approximately 30% of vehicle sales in 2030. Lightweight materials in harness

production help reduce up to 15% of the overall weight of the vehicle to improve fuel efficiency as per rigorous emission standards. Infotainment and connectivity system integration lead to much more wiring designs, up to 75% in new cars by 2025.

Modular and standardized harnesses are on the rise, thereby reducing costs by up to 15% and even enabling design optimization. In addition, progress such as multiplex wiring systems have already reduced total wiring lengths by about 20% and, thus, also cut weight and cost. It also stands to embrace the increasing challenges of self-driving autos and changing consumer requirements, mediated by safety and environmental governmental regulations.

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Key Players Listed in Automotive Wiring Harness Market Are:

- Leoni AG
- Yazaki Corporation
- Sumitomo Electric Industries
- Denso Corporation
- Marelli
- Kromberg & Schubert
- Aptiv PLC
- Lear Corporation and others

Technological Innovations and Regulatory Shifts Propel Growth in Automotive Wiring Harness Demand.

Technological advancements and changes in regulatory standards are driving demand for niche wiring solutions. For example, the rapidly growing demand for high-voltage wiring harnesses has persisted with an increase in the EV market, which grew 60% in 2023. The further use of lighter aluminum wiring by approximately 25% of automotive OEMs enhances the efficiency of the vehicles. Growth in levels of ADAS is also a growth driver as in 2024, approximately 58% of new vehicles are likely to use Level 2 and more advanced ADAS, thereby increasing the demand for powerful wiring systems. Strict safety regulations increase the demand for secure harnessing products, and over 70% of vehicles with stringent requirements on safety features place high prospects with the makers.

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Automotive Wiring Harness Market Segment Analysis

By Component

Electric wires comprise 45% of the market share because the demand for quality electrical wires in EVs supporting high voltage is growing. Connectors represent about 25%, where customers

are increasingly looking at links into multiple vehicle systems with the modern vehicle's advanced infotainment and ADAS. Terminals, making up 15% of the category, ensure safe electrical contacts and particularly in high-stress environments. Innovations in designs of terminals are contributing to weight reduction and energy efficiency in modern automotive designs. That leaves 15% for things like protective coverings, relays, and fuses, which are critical for maintaining system reliability as the wiring in vehicles grows increasingly complex.

By Electric Vehicle

The most popular BEVs currently, which account for around 65% of the segment, benefit from the attraction of zero-emission vehicles among consumers and support from Governments for sustainable transport. BEVs also need high-voltage harnesses to connect battery and electrical systems; so, makers have to design lighter, more efficient materials. PHEVs are about 35% of the market; they have significant dual power sources and require complicated harnesses to connect electric and combustion-engine components. Government incentives for hybrid vehicles boost their sales as well.

Automotive Wiring Harness Market Key Segmentation

By Component

- Electric Wires
- Connectors
- Terminals
- Others

By Application

- Body Harness
- Chassis Harness
- Engine Harness
- HVAC Harness
- Sensors Harness

By Electric Vehicle

- Battery Electric Vehicle (BEV)
- Plug-in Hybrid Electric Vehicle (PHEV)

By Vehicle

- Light Vehicle
- Heavy Vehicle

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Regional Analysis

The Asia Pacific region dominates the global automotive wiring harness market as of 2024, accounting for approximately 45% of the share. Leadership is due to the fact that major automotive manufacturers have bases in countries like China, Japan, and South Korea. Rapid growth in the production of Electric Vehicles in the region, combined with a strong thrust on novel engineering and stringent safety norms, have supported this dominant position.

North America, with a share of 25%, is characterized by advanced technological adoption, leading to the presence of prime automotive OEMs. Europe accounts for nearly 20% of the market, driven by the theme of carbon emission-free zones and greener vehicle technologies. The early adoption of ADAS as well as EVs in Europe had provided the added impetus required for the market to achieve sophisticated wiring solutions.

Recent Developments

September 2024: Chinese giant Luxshare acquired a majority 50.1% stake in German cable and wiring system manufacturer Leoni.

May 2024: Yazaki Corporation and Toray Industries have jointly developed a recycled polybutylene terephthalate (PBT) resin grade that uses scrap materials from manufacturing processes to make connectors for automotive wire harnesses.

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Contact Us:

Akash Anand
SNS Insider Pvt. Ltd
415-230-0044
info@snsinsider.com

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