

Global Automotive Electrical Harness Assembly Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Automotive Electrical Harness Assembly market size was valued at US\$ 76616 million in 2025 and is forecast to a readjusted size of US\$ 120152 million by 2032 with a CAGR of 6.2% during review period.

Automotive Electrical Harness Assembly refers to a vehicle-specific electrical interconnection unit developed according to the vehicle's electrical and electronic architecture, power distribution layout, signal transmission needs, data communication interfaces, and control command routing requirements. It combines wires, cables, terminals, connectors, protective sleeves, corrugated conduits, clips, brackets, cable ties, tapes, and other insulation or protection components into integrated harness assemblies. Its core function is to provide reliable electrical pathways across the vehicle, supporting power delivery, signal exchange, data communication, and coordinated control among the powertrain system, body control system, chassis system, lighting system, HVAC system, smart cockpit, ADAS functions, sensors, actuators, and new energy high-voltage electrical systems.

Automotive Electrical Harness Assembly can be segmented by vehicle functional area into engine harness assembly, instrument panel harness assembly, body harness assembly, chassis harness assembly, lighting harness assembly, air-conditioning harness assembly, and other dedicated harness assemblies. It can also be classified by voltage level and transmission function into low-voltage harness assembly, high-voltage harness assembly, special-purpose harness assembly, and high-speed data harness assembly. As vehicle electrical and electronic architecture evolves from distributed layouts toward domain control and zonal control, automotive electrical harness

assemblies are increasingly developing toward lightweight structure, high-voltage safety, high-speed data transmission, modular design, platform-based manufacturing, and higher system integration. In 2025, global production reached 10.20 billion pieces, with an average ex-factory price of 7.3 USD per piece.

Automotive Electrical Harness Assembly is a core electrical interconnection assembly used in vehicle electrical and electronic architecture. It supports power distribution, signal transmission, data communication, and control command routing across different vehicle systems. With the continued electrification, digitalization, and intelligence of vehicles, automotive electrical harness assemblies are evolving from traditional wire connection parts into integrated electrical connection assemblies covering low-voltage power supply, high-voltage power systems, smart cockpit, advanced driver assistance, thermal management, chassis control, body control, sensors, and actuators. Market demand is mainly driven by OEM supply for passenger cars and commercial vehicles, while aftermarket demand is mainly related to accident repair, partial replacement, and functional harness replacement. In terms of product structure, Automotive Electrical Harness Assembly can be classified by vehicle functional area into engine harness assembly, instrument panel harness assembly, body harness assembly, chassis harness assembly, lighting harness assembly, air-conditioning harness assembly, and other dedicated harness assemblies. It can also be classified by voltage level and transmission function into low-voltage harness assembly, high-voltage harness assembly, special-purpose harness assembly, and high-speed data harness assembly. Low-voltage harness assemblies remain the volume base of the industry, while high-voltage harness assemblies are mainly driven by the penetration of new energy vehicles. Special-purpose harness assemblies and high-speed data harness assemblies are gaining value due to intelligent driving, cameras, radar, automotive Ethernet, domain controllers, and zonal control architecture. In terms of application, Automotive Electrical Harness Assembly is widely used in engine control, body control, chassis systems, lighting systems, air conditioning and thermal management systems, smart cockpit, advanced driver assistance systems, battery packs, electric drive systems, OBC, DC/DC converters, charging interfaces, sensors, and actuators. New energy vehicles require more high-voltage harness assemblies, shielded harness assemblies, heat-resistant harness assemblies, and high-reliability connectors. In intelligent vehicles, the increasing number of sensors, domain controllers, and high-speed data interfaces further increases the complexity and value per vehicle of electrical harness assemblies. In terms of cost structure, the cost of Automotive Electrical Harness Assembly mainly consists of copper or aluminum wires, cables, connectors, terminals, protective sleeves, corrugated conduits, tapes, cable ties, fuse boxes, protection components, manual assembly, testing, and logistics. Copper

materials, connectors, and terminals account for a relatively high proportion of total cost, making raw material price fluctuations an important factor affecting profitability. Due to customized design, multiple branches, high labor intensity, long validation cycles, and vehicle-platform-specific requirements, suppliers usually need to participate deeply in automakers' vehicle development programs and provide localized or near-shore supply support around OEM production plants. From the manufacturing perspective, the production process of Automotive Electrical Harness Assembly mainly includes wire cutting, stripping, terminal crimping, welding, twisting, sleeving, branch assembly, continuity testing, air-tightness testing, high-voltage testing, visual inspection, and final packaging. For branch harnesses or functional harness assemblies, an automated wire cutting and crimping line can usually reach annual capacity of several million to tens of millions of pieces. For vehicle-platform harness assembly, a single assembly line usually supports 100,000 to 500,000 sets of functional harness assemblies per year, depending on product complexity, automation level, labor configuration, and OEM production rhythm. In terms of competition, the global Automotive Electrical Harness Assembly market includes major suppliers such as Yazaki, Sumitomo Electric, Aptiv, Lear, Leoni, Furukawa Electric, DRAXLMAIER, Kromberg & Schubert, Fujikura, Motherson, Nexans Autoelectric, and FinDreams. Industry consolidation and cross-regional supply-chain restructuring have accelerated in recent years. For Leoni, Luxshare-ICT completed the acquisition of a controlling stake in Leoni AG and its Wiring Systems Division in 2025, while TIME Interconnect, a Luxshare subsidiary, acquired Leoni's Automotive Cable Solutions business. In April 2026, Luxshare further increased its shareholding in Leoni AG from 50.1% to 74.9%, strengthening the role of Chinese connector and wiring harness supply-chain players in the European automotive electrical harness assembly market. Another key transaction is the proposed acquisition of Nexans Autoelectric by Motherson. Nexans announced in December 2025 that it had entered exclusive negotiations with Motherson for the sale of Autoelectric, a business focused on automotive wiring harness and vehicle wiring system solutions, with 2024 annual sales of about EUR 749 million and nearly 14,000 employees. Motherson stated that the transaction targets the acquisition of 100% of Nexans Autoelectric's global wiring harness business, subject to employee consultation, regulatory approvals, and customary closing conditions. The European Commission approved the acquisition in April 2026, while Nexans' subsequent documents still referred to an expected closing in 2026. Therefore, it is more appropriate to mark Nexans Autoelectric as proposed acquisition by Motherson / transaction in progress in the company list. Overall, the conventional low-voltage Automotive Electrical Harness Assembly market is relatively mature, with gross margins generally ranging from 10% to 18%. High-voltage harness assemblies, special-purpose harness assemblies, and high-speed data harness assemblies require stronger capabilities in materials, shielding, voltage resistance,

thermal management, reliability, and validation, and their gross margins can generally reach 18% to 30%. In the future, the industry will continue to develop toward lightweight design, aluminum wire substitution, modular design, high-voltage and high-current connection, high-speed data transmission, zonal wiring architecture, and automated manufacturing. At the same time, ownership changes involving European wiring harness assets such as Leoni and Nexans Autoelectric show that the global automotive electrical harness assembly industry is moving from traditional regional supply models toward multinational group integration, regional capacity coordination, and new energy vehicle supply-chain restructuring.

This report is a detailed and comprehensive analysis for global Automotive Electrical Harness Assembly market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Automotive Electrical Harness Assembly market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Electrical Harness Assembly market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Electrical Harness Assembly market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Electrical Harness Assembly market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive Electrical Harness Assembly

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive Electrical Harness Assembly market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Yazaki, Sumitomo Electric, Luxshare Precision, Aptiv, Furukawa Electric, Lear, Tianhai Auto Electronics, DRAXLMAIER, Nexans Autoelectric (Motherson), Kunshan Huguang Auto Harness, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Automotive Electrical Harness Assembly market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Low-voltage Wiring Harness

High-voltage Wiring Harness

Market segment by Vehicles

Fule Vehicles

Electric Vehicles

Market segment by Vehicle Installation Area

Engine Wiring Harness

Instrument Panel Wiring Harness

Chassis Wiring Harness

Lighting Wiring Harness

Air Conditioning Wiring Harness

Others

Market segment by Application

OEM

Aftermarket

Major players covered

Yazaki

Sumitomo Electric

Luxshare Precision

Aptiv

Furukawa Electric

Lear

Tianhai Auto Electronics

DRAXLMAIER

Nexans Autoelectric (Motherson)

Kunshan Huguang Auto Harness

Kromberg & Schubert

Fujikura

Shanghai Jintong Auto Harness

FinDreams

Coroplast

Liuzhou Shuangfei Auto Electric Appliances Manufacturing

Shenzhen Uniconn Technology

Changchun Jetty Automotive Technology

Shenzhen Deren Electronic

Motherson

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Automotive Electrical Harness Assembly product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automotive Electrical Harness Assembly, with price, sales quantity, revenue, and global market share of Automotive Electrical Harness Assembly from 2021 to 2026.

Chapter 3, the Automotive Electrical Harness Assembly competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automotive Electrical Harness Assembly breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Automotive Electrical Harness Assembly market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Automotive Electrical Harness Assembly.

Chapter 14 and 15, to describe Automotive Electrical Harness Assembly sales channel, distributors, customers, research findings and conclusion.

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