

Global Automotive Electrical Harness Assembly Market Growth 2026-2032

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Abstracts

The global Automotive Electrical Harness Assembly market size is predicted to grow from US\$ 72841 million in 2025 to US\$ 116767 million in 2032; it is expected to grow at a CAGR of 6.6% from 2026 to 2032.

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.

LP Information, Inc. (LPI) ' newest research report, the "Automotive Electrical Harness Assembly Industry Forecast" looks at past sales and reviews total world Automotive Electrical Harness Assembly sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive Electrical Harness Assembly sales for 2026 through 2032. With Automotive Electrical Harness Assembly sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Automotive Electrical Harness Assembly industry.

This Insight Report provides a comprehensive analysis of the global Automotive Electrical Harness Assembly landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive Electrical Harness Assembly portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive Electrical Harness Assembly market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive Electrical Harness Assembly and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive Electrical Harness Assembly.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive Electrical Harness Assembly market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Low-voltage Wiring Harness

High-voltage Wiring Harness

Segmentation by Vehicles:

Fule Vehicles

Electric Vehicles

Segmentation by Vehicle Installation Area:

Engine Wiring Harness

Instrument Panel Wiring Harness

Chassis Wiring Harness

Lighting Wiring Harness

Air Conditioning Wiring Harness

Others

Segmentation by Application:

OEM

Aftermarket

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive Electrical Harness Assembly market?

What factors are driving Automotive Electrical Harness Assembly market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive Electrical Harness Assembly market opportunities vary by end market size?

How does Automotive Electrical Harness Assembly break out by Type, by Application?

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