

Aircraft Electrical Wiring Interconnection System (EWIS) Market Forecasts to 2034 – Global Analysis By Component (Wires & Cables, Connectors & Connector Accessories, Terminals & Splices, Protection Materials & Clamps, Grounding & Bonding Devices, Pressure Seals, and Other Components), System Type, Aircraft Type, Installation Type, Application, End User and By Geography

<https://marketpublishers.com/r/A3A9D60A1BE2EN.html>

Date: March 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: A3A9D60A1BE2EN

Abstracts

According to Statistics MRC, the Global Aircraft Electrical Wiring Interconnection System (EWIS) Market is accounted for \$6.6 billion in 2026 and is expected to reach \$9.8 billion by 2034 growing at a CAGR of 5.2% during the forecast period. The Aircraft Electrical Wiring Interconnection System (EWIS) comprises the complete set of wiring, cables, connectors, and related elements that deliver electrical power and data across an aircraft. It supports essential functions such as avionics, lighting, and flight control systems. Proper design, installation, and upkeep of EWIS are vital for operational safety and reliability, as electrical faults can cause system failures, fires, or other risks, emphasizing the importance of thorough inspection and maintenance in aviation.

Market Dynamics:

Driver:

Rising aircraft production and fleet modernization

The global surge in air travel demand is compelling original equipment manufacturers

(OEMs) to ramp up aircraft production rates, directly fueling the need for advanced EWIS components. Simultaneously, airlines are modernizing their fleets with next-generation, fuel-efficient aircraft like the Boeing 787 and Airbus A350, which feature more electric architectures and therefore require more sophisticated and extensive wiring systems. This dual thrust of new aircraft builds and fleet upgrades creates sustained demand. Furthermore, the increasing complexity of onboard systems, including advanced avionics, fly-by-wire controls, and high-bandwidth connectivity for passengers, necessitates robust and high-performance EWIS solutions, ensuring steady market growth.

Restraint:

Complexity in design, installation, and certification

The design and integration of EWIS into modern aircraft platforms is an extraordinarily complex task, requiring meticulous planning to manage weight, ensure signal integrity, and prevent electromagnetic interference. This complexity extends to the installation phase, where skilled technicians are needed to route and secure thousands of wires within tight airframe spaces. Furthermore, the aerospace industry's stringent certification processes, governed by bodies like the FAA and EASA, demand exhaustive documentation and testing to prove airworthiness. These multifaceted challenges can lead to significant development delays and increased costs for both OEMs and tier-1 suppliers, acting as a substantial barrier to rapid innovation and market entry.

Opportunity:

Growth of urban air mobility (UAM) and advanced air mobility (AAM)

The emergence of Urban Air Mobility (UAM) and Advanced Air Mobility (AAM), encompassing electric vertical takeoff and landing (eVTOL) aircraft, presents a transformative opportunity for the EWIS market. These new vehicle paradigms are heavily reliant on electric propulsion and distributed powertrains, requiring entirely new classes of lightweight, high-voltage, and high-power electrical wiring systems. As startups and aerospace giants alike race to certify and commercialize these air taxis and autonomous cargo vehicles, a greenfield market for specialized EWIS is created. This includes demand for advanced connectors, high-current-carrying cables, and smart monitoring systems, paving the way for significant innovation and long-term growth.

Threat:

Volatility in raw material prices and supply chain fragility

Geopolitical instability, trade disputes, or supply chain bottlenecks can cause significant price volatility, squeezing profit margins for manufacturers. Furthermore, the specialized nature of aerospace-grade polymers and insulation materials makes the supply chain vulnerable to disruptions, as seen during global events. A shortage of a single component, such as a specific connector or shielding material, can halt the entire aircraft production line, underscoring the need for robust, diversified, and resilient sourcing strategies.

Covid-19 Impact:

The COVID-19 pandemic severely disrupted the aerospace supply chain, causing a sharp decline in aircraft production rates as airlines deferred deliveries and travel demand plummeted. This led to an immediate contraction in demand for new EWIS installations. However, the crisis also prompted airlines to accelerate the retirement of older, less efficient aircraft, creating a future need for more advanced models. Furthermore, the pandemic underscored the importance of digitalization and health monitoring, potentially accelerating the integration of smart sensors into EWIS for predictive maintenance. The focus has now shifted towards building more resilient and localized supply chains to withstand future global disruptions.

The wires & cables segment is expected to be the largest during the forecast period

The wires & cables segment is expected to account for the largest market share during the forecast period, driven by its critical function as the central nervous system of an aircraft. These pre-assembled bundles of wires, cables, and connectors simplify complex installations, reduce assembly time on the production line, and enhance reliability by minimizing human error. Their application spans every aircraft section, from the fuselage to the wings, powering avionics, flight controls, and cabin systems.

The aftermarket segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the aftermarket segment is predicted to witness the highest growth rate, driven by aging global aircraft fleets requiring regular maintenance, repair, and overhaul (MRO) of wiring systems. Stringent regulatory mandates for periodic EWIS inspections and replacements are fueling demand for replacement connectors,

cables, and repair kits. Additionally, retrofit projects for avionics upgrades, cabin modernization, and in-flight connectivity installations necessitate significant aftermarket EWIS modifications, ensuring sustained growth throughout the forecast period.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to its leadership in next-generation aircraft programs and significant defense spending. The United States, home to aerospace giants like Boeing and a vast ecosystem of innovative suppliers, is at the forefront of developing new aircraft with more electric architectures. Substantial investments in research and development for advanced materials, smart connectors, and lightweight cabling are driving technological advancements.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, propelled by the region's dominance in commercial aircraft manufacturing and its rapidly expanding airline fleets. Countries like China, Japan, and Singapore are home to major assembly lines for both Airbus and Boeing, driving substantial demand for new EWIS installations. Furthermore, the region's burgeoning middle class is fueling unprecedented growth in air travel, compelling local carriers to aggressively expand their fleets.

Key players in the market

Some of the key players in Aircraft Electrical Wiring Interconnection System (EWIS) Market include TE Connectivity Ltd., Leoni AG, Amphenol Corporation, Esterline Technologies Corporation, Safran S.A., Radiall S.A., GKN Aerospace, Carlisle Interconnect Technologies, Latecoere Group, Molex LLC, Ducommun Incorporated, Eaton Corporation, Co?Operative Industries Aerospace & Defense (Cia&D), Honeywell International Inc., and Interconnect Wiring.

Key Developments:

In February 2026, Honeywell announced that it has entered into an amended agreement to acquire Johnson Matthey's Catalyst Technologies business segment, which adjusts the total consideration from ?1.8 billion to ?1.325 billion and extends the long stop date to July 21, 2026. In the event that any of the regulatory approvals are not

satisfied by the long stop date, the long stop date may be extended to August 21, 2026, if certain conditions are met.

In September 2024, Eaton announced the signing of a Memorandum of Understanding (MoU) with the Government of Tamil Nadu. This agreement marks a significant step in Eaton's expansion plans for its Crouse-Hinds and B-Line business, reinforcing the company's commitment to driving innovation and growth in India through its sustainable solutions.

Components Covered:

Wires & Cables

Connectors & Connector Accessories

Terminals & Splices

Protection Materials & Clamps

Grounding & Bonding Devices

Pressure Seals

Other Components

System Types Covered:

Primary Electrical Systems

Secondary Electrical Systems

Wiring Harness Assemblies

Distribution & Protection Systems

Monitoring & Diagnostic Systems

Other System Types

Aircraft Types Covered:

Commercial Aviation

Military Aviation

Business & General Aviation

Rotary Wing

Unmanned Aerial Systems

Installation Types Covered:

New Installations

Retrofit & Upgrade Installations

Applications Covered:

Avionics & Mission Systems

Airframe Wiring

Propulsion Systems Wiring

Cabin Interiors & IFEC

Power Distribution Systems

Other Applications

End Users Covered:

Original Equipment Manufacturers (OEMs)

Aftermarket

Defense / Military Procurement

Urban Air Mobility

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations

- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL AIRCRAFT ELECTRICAL WIRING INTERCONNECTION SYSTEM (EWIS) MARKET, BY COMPONENT

- 5.1 Wires & Cables
- 5.2 Connectors & Connector Accessories
- 5.3 Terminals & Splices
- 5.4 Protection Materials & Clamps
- 5.5 Grounding & Bonding Devices
- 5.6 Pressure Seals
- 5.7 Other Components

6 GLOBAL AIRCRAFT ELECTRICAL WIRING INTERCONNECTION SYSTEM (EWIS) MARKET, BY SYSTEM TYPE

- 6.1 Primary Electrical Systems
- 6.2 Secondary Electrical Systems
- 6.3 Wiring Harness Assemblies
- 6.4 Distribution & Protection Systems
- 6.5 Monitoring & Diagnostic Systems
- 6.6 Other System Types

7 GLOBAL AIRCRAFT ELECTRICAL WIRING INTERCONNECTION SYSTEM (EWIS) MARKET, BY AIRCRAFT TYPE

- 7.1 Commercial Aviation
 - 7.1.1 Narrow Body
 - 7.1.2 Wide Body
 - 7.1.3 Regional Transport Aircraft
- 7.2 Military Aviation
 - 7.2.1 Fighter Aircraft
 - 7.2.2 Transport & Special Mission
- 7.3 Business & General Aviation
 - 7.3.1 Business Jets
 - 7.3.2 Light Aircraft
- 7.4 Rotary Wing

7.5 Unmanned Aerial Systems

8 GLOBAL AIRCRAFT ELECTRICAL WIRING INTERCONNECTION SYSTEM (EWIS) MARKET, BY INSTALLATION TYPE

8.1 New Installations

8.2 Retrofit & Upgrade Installations

9 GLOBAL AIRCRAFT ELECTRICAL WIRING INTERCONNECTION SYSTEM (EWIS) MARKET, BY APPLICATION

9.1 Avionics & Mission Systems

9.2 Airframe Wiring

9.3 Propulsion Systems Wiring

9.4 Cabin Interiors & IFEC

9.5 Power Distribution Systems

9.6 Other Applications

10 GLOBAL AIRCRAFT ELECTRICAL WIRING INTERCONNECTION SYSTEM (EWIS) MARKET, BY END USER

10.1 Original Equipment Manufacturers (OEMs)

10.2 Aftermarket

10.3 Defense / Military Procurement

10.4 Urban Air Mobility

10.5 Other End Users

11 GLOBAL AIRCRAFT ELECTRICAL WIRING INTERCONNECTION SYSTEM (EWIS) MARKET, BY GEOGRAPHY

11.1 North America

11.1.1 United States

11.1.2 Canada

11.1.3 Mexico

11.2 Europe

11.2.1 United Kingdom

11.2.2 Germany

11.2.3 France

11.2.4 Italy

- 11.2.5 Spain
- 11.2.6 Netherlands
- 11.2.7 Belgium
- 11.2.8 Sweden
- 11.2.9 Switzerland
- 11.2.10 Poland
- 11.2.11 Rest of Europe
- 11.3 Asia Pacific
 - 11.3.1 China
 - 11.3.2 Japan
 - 11.3.3 India
 - 11.3.4 South Korea
 - 11.3.5 Australia
 - 11.3.6 Indonesia
 - 11.3.7 Thailand
 - 11.3.8 Malaysia
 - 11.3.9 Singapore
 - 11.3.10 Vietnam
 - 11.3.11 Rest of Asia Pacific
- 11.4 South America
 - 11.4.1 Brazil
 - 11.4.2 Argentina
 - 11.4.3 Colombia
 - 11.4.4 Chile
 - 11.4.5 Peru
 - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
 - 11.5.1 Middle East
 - 11.5.1.1 Saudi Arabia
 - 11.5.1.2 United Arab Emirates
 - 11.5.1.3 Qatar
 - 11.5.1.4 Israel
 - 11.5.1.5 Rest of Middle East
 - 11.5.2 Africa
 - 11.5.2.1 South Africa
 - 11.5.2.2 Egypt
 - 11.5.2.3 Morocco
 - 11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 13.1 Mergers and Acquisitions
- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications
- 13.4 Capacity Expansion and Investments
- 13.5 Other Strategic Initiatives

14 COMPANY PROFILES

- 14.1 TE Connectivity Ltd.
- 14.2 Leoni AG
- 14.3 Amphenol Corporation
- 14.4 Esterline Technologies Corporation
- 14.5 Safran S.A.
- 14.6 Radiall S.A.
- 14.7 GKN Aerospace
- 14.8 Carlisle Interconnect Technologies
- 14.9 Latecoere Group
- 14.10 Molex LLC
- 14.11 Ducommun Incorporated
- 14.12 Eaton Corporation
- 14.13 Co Operative Industries Aerospace & Defense (Cia&D)
- 14.14 Honeywell International Inc.
- 14.15 Interconnect Wiring

List Of Tables

LIST OF TABLES

Table 1 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Component (2023-2034) (\$MN)

Table 3 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Wires & Cables (2023-2034) (\$MN)

Table 4 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Connectors & Connector Accessories (2023-2034) (\$MN)

Table 5 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Terminals & Splices (2023-2034) (\$MN)

Table 6 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Protection Materials & Clamps (2023-2034) (\$MN)

Table 7 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Grounding & Bonding Devices (2023-2034) (\$MN)

Table 8 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Pressure Seals (2023-2034) (\$MN)

Table 9 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Other Components (2023-2034) (\$MN)

Table 10 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By System Type (2023-2034) (\$MN)

Table 11 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Primary Electrical Systems (2023-2034) (\$MN)

Table 12 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Secondary Electrical Systems (2023-2034) (\$MN)

Table 13 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Wiring Harness Assemblies (2023-2034) (\$MN)

Table 14 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Distribution & Protection Systems (2023-2034) (\$MN)

Table 15 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Monitoring & Diagnostic Systems (2023-2034) (\$MN)

Table 16 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Other System Types (2023-2034) (\$MN)

Table 17 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Aircraft Type (2023-2034) (\$MN)

Table 18 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Commercial Aviation (2023-2034) (\$MN)

Table 19 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Narrow Body (2023-2034) (\$MN)

Table 20 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Wide Body (2023-2034) (\$MN)

Table 21 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Regional Transport Aircraft (2023-2034) (\$MN)

Table 22 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Military Aviation (2023-2034) (\$MN)

Table 23 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Fighter Aircraft (2023-2034) (\$MN)

Table 24 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Transport & Special Mission (2023-2034) (\$MN)

Table 25 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Business & General Aviation (2023-2034) (\$MN)

Table 26 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Business Jets (2023-2034) (\$MN)

Table 27 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Light Aircraft (2023-2034) (\$MN)

Table 28 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Rotary Wing (2023-2034) (\$MN)

Table 29 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Unmanned Aerial Systems (2023-2034) (\$MN)

Table 30 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Installation Type (2023-2034) (\$MN)

Table 31 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By New Installations (2023-2034) (\$MN)

Table 32 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Retrofit & Upgrade Installations (2023-2034) (\$MN)

Table 33 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Application (2023-2034) (\$MN)

Table 34 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Avionics & Mission Systems (2023-2034) (\$MN)

Table 35 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Airframe Wiring (2023-2034) (\$MN)

Table 36 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Propulsion Systems Wiring (2023-2034) (\$MN)

Table 37 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market

Outlook, By Cabin Interiors & IFEC (2023-2034) (\$MN)

Table 38 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Power Distribution Systems (2023-2034) (\$MN)

Table 39 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Other Applications (2023-2034) (\$MN)

Table 40 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By End User (2023-2034) (\$MN)

Table 41 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Original Equipment Manufacturers (OEMs) (2023-2034) (\$MN)

Table 42 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Aftermarket (2023-2034) (\$MN)

Table 43 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Defense / Military Procurement (2023-2034) (\$MN)

Table 44 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Urban Air Mobility (2023-2034) (\$MN)

Table 45 Global Aircraft Electrical Wiring Interconnection System (EWIS) Market Outlook, By Other End Users (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

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