

# **Automotive Secondary Wiring Harness Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Vehicle Type (ICE and EV), By Application (Cabin, Door Harness, Engine Harness, Airbag Harness, Electronic Parking Brakes and Electronic Gear Shift System), By Regional, Competition**

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## **Abstracts**

The Global Automotive Secondary Wiring Harness Market reached a valuation of USD 19 billion in 2022 and is poised for substantial growth in the forecast period, with a projected CAGR of 9.6% through 2028.

The global automotive secondary wiring harness market serves as a critical backbone of the automotive industry, comprising a complex network of electrical connections that facilitate the transmission of signals and power to various vehicle systems and components. These secondary wiring harnesses play an indispensable role in enabling the functionality of advanced electronics, safety features, and vehicle connectivity. Within this intricate web of wires, connectors, and terminals lies the key to seamless data, power, and signal transmission among diverse vehicle systems, encompassing everything from lighting and sensors to control modules and infotainment systems. Their significance in enhancing vehicle safety, comfort, and functionality underscores their integral role in modern automobiles.

A multitude of driving forces propel the growth of the global automotive secondary wiring harness market. Foremost among these is the profound shift in the automotive industry toward vehicle electrification, including hybrid and electric vehicles (EVs). These advanced vehicle types rely on intricate secondary wiring harnesses to manage

complex electrical systems, powertrains, and charging components. With the global demand for EVs continuing to surge, the secondary wiring harness market is positioned for substantial growth.

Furthermore, the proliferation of advanced electronic features in modern vehicles, such as infotainment systems and connectivity solutions, further emphasizes the importance of secondary wiring harnesses. These harnesses are instrumental in supporting the connectivity and functionality of these sophisticated systems, thereby driving their widespread adoption in the automotive industry.

Another notable driver of the global automotive secondary wiring harness market is the increasing emphasis on vehicle safety. The automotive sector places paramount focus on enhancing safety features and systems, including airbags, anti-lock braking systems (ABS), electronic stability control (ESC), and advanced driver-assistance systems (ADAS). These safety components rely on secondary wiring harnesses to ensure seamless communication and operation. As the demand for safer vehicles continues to grow worldwide, the secondary wiring harness market experiences a surge in demand driven by the need for reliable electrical connections underpinning these critical safety technologies.

Furthermore, the rise of autonomous vehicles represents a significant driver for the secondary wiring harness market. Autonomous or self-driving vehicles rely on a multitude of sensors, cameras, LiDAR, radar systems, and intricate electronics to navigate and operate safely. Wiring harnesses play a pivotal role in providing the necessary connectivity and power distribution for these components, enabling the seamless functioning of autonomous driving systems. As the development and deployment of autonomous vehicles progress, the demand for advanced and sophisticated secondary wiring harnesses is expected to escalate.

## Key Market Drivers

### Vehicle Electrification and Hybridization

One of the primary drivers of the global automotive secondary wiring harness market is the ongoing shift towards vehicle electrification and hybridization. With the automotive industry moving towards greener and more fuel-efficient alternatives, electric vehicles (EVs) and hybrid electric vehicles (HEVs) have gained significant traction. These advanced vehicle types rely on intricate secondary wiring harnesses to manage the complex electrical systems, powertrains, and charging components essential for their

operation. EVs, in particular, require extensive wiring to support high-voltage systems, battery management, electric motors, and charging infrastructure. The secondary wiring harnesses in EVs must handle high currents and ensure the safety and reliability of electrical connections. As global demand for EVs continues to grow, so does the need for specialized secondary wiring harnesses capable of accommodating the unique requirements of electric and hybrid vehicles.

### Proliferation of Advanced Electronics

Modern vehicles are increasingly equipped with advanced electronic features that enhance safety, comfort, connectivity, and entertainment. This proliferation of advanced electronics is a significant driver of the automotive secondary wiring harness market. These electronics include infotainment systems, advanced driver-assistance systems (ADAS), connectivity solutions, telematics, and complex sensor arrays.

Infotainment systems, for example, encompass touchscreen displays, multimedia interfaces, navigation systems, and connectivity to smartphones and external devices. These systems require extensive wiring to support data transmission, power distribution, and integration with other vehicle systems. ADAS, which includes features like adaptive cruise control, lane-keeping assist, and collision avoidance, relies on sensor networks and intricate wiring harnesses to function effectively.

As consumers demand more sophisticated and connected vehicles, automakers are compelled to incorporate advanced electronics, thereby driving the demand for secondary wiring harnesses that can accommodate the growing complexity of these systems.

### Emphasis on Vehicle Safety

Safety remains a paramount concern in the automotive industry, and vehicle manufacturers are continually enhancing safety features and systems to meet stringent safety standards and consumer expectations. Secondary wiring harnesses are integral to the functionality of various safety components, including airbags, anti-lock braking systems (ABS), electronic stability control (ESC), and tire pressure monitoring systems (TPMS).

Airbag systems, for example, rely on sensor inputs and a complex network of wiring to ensure timely deployment during a collision. ABS and ESC systems require real-time data transmission and precise control, which is facilitated by secondary wiring

harnesses. Additionally, TPMS relies on sensors embedded in the wheels, requiring wiring to transmit tire pressure data to the vehicle's onboard computer.

As governments and consumers prioritize vehicle safety, the demand for secondary wiring harnesses that support these critical safety systems continues to grow. Meeting safety regulations and enhancing vehicle occupant protection drive the market for advanced wiring solutions.

### Growth of Autonomous Vehicles

The advent of autonomous or self-driving vehicles represents another significant driver for the global automotive secondary wiring harness market. Autonomous vehicles rely on a multitude of sensors, cameras, LiDAR (Light Detection and Ranging), radar systems, and intricate electronics to navigate and operate safely. Secondary wiring harnesses play a pivotal role in providing the necessary connectivity and power distribution for these components.

LiDAR and radar systems, for example, require precise data transmission to detect and respond to the vehicle's surroundings in real-time. Cameras and sensors that monitor lane markings, traffic signals, and pedestrian movements rely on secondary wiring harnesses to transmit data to the vehicle's central processing unit.

As the development and deployment of autonomous vehicles continue to progress, the demand for advanced and sophisticated secondary wiring harnesses is expected to escalate. These harnesses must support the intricate sensor networks and electrical components that enable autonomous driving capabilities.

### Automotive Aftermarket Demand

Beyond the original equipment manufacturers (OEMs), the automotive aftermarket sector contributes to the growth of the global secondary wiring harness market. With the increasing complexity of vehicle electronics and the need for maintenance, repair, and upgrades, the aftermarket becomes a vital market segment for secondary wiring harnesses.

Automotive enthusiasts, independent repair shops, and service centers require a steady supply of replacement harnesses to ensure the continued functionality and safety of vehicles. As vehicles age and experience wear and tear, secondary wiring harnesses may need replacement due to damage, corrosion, or electrical issues. This aftermarket

demand represents a lucrative avenue for secondary wiring harness manufacturers and suppliers, particularly for older vehicles and custom modifications.

### Lightweighting and Compact Design

Automotive manufacturers are under continuous pressure to reduce vehicle weight and improve fuel efficiency to meet stringent emissions standards and consumer demands. This emphasis on lightweighting poses both a challenge and an opportunity for the secondary wiring harness market. Wiring harnesses must evolve to be lighter and more space-efficient while maintaining reliability and durability.

The development of advanced materials and manufacturing processes is essential in achieving lightweight and compact wiring solutions. These materials can reduce the overall weight of the harness while ensuring they meet stringent automotive standards for performance, safety, and durability.

### Sustainability and Environmental Concerns

The automotive industry faces increasing scrutiny regarding environmental sustainability and the ecological impact of vehicle production and operation. Secondary wiring harness manufacturers are compelled to align with eco-friendly practices, explore recyclable materials, and adopt sustainable manufacturing processes.

Efforts are underway to minimize the environmental footprint of wiring harness production and disposal. Sustainable practices encompass the use of recyclable materials, eco-conscious design principles, and responsible disposal or recycling of harnesses at the end of their lifecycle. Eco-friendly initiatives resonate with environmentally conscious consumers and regulatory requirements, influencing the choices made by automotive manufacturers and secondary wiring harness suppliers.

### Key Market Challenges

#### Complexity of Vehicle Systems and Electronics

One of the primary challenges in the automotive secondary wiring harness market is the escalating complexity of vehicle systems and electronics. Modern vehicles are equipped with an ever-expanding array of advanced features, including infotainment systems, advanced driver-assistance systems (ADAS), connectivity solutions, and sensor networks. These systems require intricate wiring harnesses to facilitate data

transmission, power distribution, and integration with other vehicle components.

The challenge lies in designing and manufacturing secondary wiring harnesses capable of accommodating this growing complexity. Harnesses must include numerous connectors, terminals, and wires to support various electronic components. Ensuring the reliability, durability, and ease of installation of these complex harnesses is a significant engineering and manufacturing challenge.

### Demand for Lightweight and Compact Solutions

In response to environmental regulations and consumer demands for fuel efficiency, automakers are focused on reducing vehicle weight and improving fuel economy. This emphasis on lightweighting extends to all vehicle components, including wiring harnesses. The challenge for the automotive secondary wiring harness market is to develop harnesses that are lighter and more space-efficient while maintaining high levels of performance, safety, and durability.

Achieving lightweight and compact designs requires the use of advanced materials and manufacturing techniques. These materials should be capable of withstanding the rigors of the automotive environment while contributing to weight reduction. Manufacturers must also consider the integration of new materials without compromising the reliability and longevity of the wiring harness.

### Sustainability and Environmental Concerns

The automotive industry is facing increasing scrutiny regarding sustainability and environmental impact. Wiring harness manufacturers are under pressure to adopt eco-friendly practices, explore recyclable materials, and minimize their ecological footprint. This challenge extends to both the production and disposal of wiring harnesses.

Sustainable practices encompass the use of recyclable materials in harness construction, eco-conscious design principles, and responsible disposal or recycling of harnesses at the end of their lifecycle. Implementing these practices requires significant investment in research and development, as well as changes in manufacturing processes. Additionally, ensuring compliance with environmental regulations and standards is an ongoing challenge for the industry.

### Quality and Reliability Standards

Ensuring the quality and reliability of automotive secondary wiring harnesses is a continuous challenge for manufacturers. These harnesses play a critical role in vehicle safety, functionality, and performance, making quality control paramount. Meeting stringent quality and reliability standards is essential to prevent electrical faults, malfunctions, and safety hazards.

Manufacturers must invest in rigorous testing and quality assurance processes to identify and rectify defects in harnesses. This includes conducting tests for electrical continuity, insulation resistance, and resistance to environmental factors such as heat, humidity, and vibrations. Meeting these standards not only adds to manufacturing costs but also requires ongoing monitoring and continuous improvement efforts.

### Supply Chain Disruptions

The automotive industry relies on complex global supply chains that source components and materials from various regions. Supply chain disruptions, such as those caused by natural disasters, geopolitical tensions, and global events like the COVID-19 pandemic, can significantly impact the availability of critical components, including wiring harnesses.

Supply chain disruptions can lead to delays in production, increased costs, and challenges in meeting customer demand. Manufacturers must implement strategies to mitigate supply chain risks, including diversifying sourcing options, building inventory buffers, and developing contingency plans for unforeseen disruptions.

### Evolving Automotive Regulations and Standards

The automotive industry is subject to evolving regulations and safety standards, both at the national and international levels. Compliance with these regulations is essential for market access and consumer trust. However, staying abreast of changing regulations and ensuring that wiring harnesses meet the latest standards can be a daunting task.

Manufacturers must invest in regulatory compliance efforts, including conducting tests, audits, and certifications to demonstrate adherence to safety and quality standards. Keeping pace with regulatory changes and adapting harness designs and materials accordingly requires ongoing diligence and expertise in the evolving regulatory landscape.

### Cost Pressures

Cost pressures are a perennial challenge for the automotive industry, including the secondary wiring harness market. Manufacturers face the dual challenge of meeting increasing demands for advanced features and safety systems while managing costs. Wiring harnesses represent a significant portion of a vehicle's electrical components, and optimizing their cost without compromising quality or performance is a delicate balancing act.

The challenge lies in finding cost-effective materials, manufacturing processes, and supply chain solutions while maintaining the required levels of quality and reliability. Cost pressures can also lead to increased competition among wiring harness suppliers, further challenging profitability and innovation within the market.

### Technological Advancements

While technological advancements drive innovation within the automotive industry, they also present challenges for secondary wiring harness manufacturers. Rapid technological changes can lead to the obsolescence of existing harness designs and materials, necessitating frequent updates and redesigns.

Keeping pace with these advancements requires significant research and development investments, as well as the ability to adapt to new materials, connectors, and wiring technologies. Manufacturers must anticipate and respond to emerging trends in vehicle electrification, connectivity, autonomous driving, and safety systems to remain competitive in the market.

### Integration and Compatibility

As vehicles become more interconnected and feature-rich, the challenge of ensuring seamless integration and compatibility between secondary wiring harnesses and various electronic components becomes increasingly complex. Wiring harnesses must be designed to accommodate the diverse array of connectors, sensors, and modules found in modern vehicles.

Ensuring that harnesses can interface with different electronic architectures and vehicle platforms is a significant challenge. Compatibility issues can lead to system malfunctions, software errors, and vehicle recalls, which can have reputational and financial consequences for both automakers and harness suppliers.



## Talent and Skills Shortages

The automotive industry is experiencing a shortage of skilled labor and engineering talent, including those with expertise in wiring harness design and manufacturing. As harnesses become more technologically advanced, there is a growing need for engineers and technicians who can design, test, and maintain these intricate systems.

Attracting and retaining top talent is a persistent challenge for manufacturers in the automotive secondary wiring harness market. Companies must invest in training programs, develop succession plans, and foster a culture of innovation and continuous learning to address the skills gap.

## Key Market Trends

### Vehicle Electrification and Hybridization

A prominent trend in the automotive industry is the rapid growth of vehicle electrification, encompassing electric vehicles (EVs) and hybrid electric vehicles (HEVs). This trend has a direct impact on the automotive secondary wiring harness market. EVs, in particular, require extensive secondary wiring harnesses to manage high-voltage systems, battery management, electric motors, and charging infrastructure.

Secondary wiring harnesses for electric vehicles must handle high currents and ensure the safety and reliability of electrical connections. As global demand for EVs continues to surge, secondary wiring harness manufacturers are developing specialized solutions to meet the unique requirements of electric and hybrid vehicles. This trend is expected to gain momentum as automakers expand their electric vehicle portfolios.

### Proliferation of Advanced Electronics

The automotive industry is experiencing a proliferation of advanced electronic features within vehicles. These features encompass infotainment systems, advanced driver-assistance systems (ADAS), connectivity solutions, telematics, and sensor networks. The integration of these advanced electronics is driving the demand for sophisticated secondary wiring harnesses capable of facilitating data transmission, power distribution, and seamless integration with other vehicle components.

Infotainment systems, for example, include touchscreen displays, multimedia interfaces, navigation systems, and connectivity to smartphones and external devices. ADAS

features, such as adaptive cruise control, lane-keeping assist, and collision avoidance, rely on sensor networks and intricate wiring harnesses to function effectively. This trend underscores the growing complexity of secondary wiring harnesses and their pivotal role in supporting advanced electronic features.

### Lightweighting and Compact Design

Weight reduction and improved fuel efficiency are critical objectives for automakers to meet stringent emissions standards and consumer demands. This emphasis on lightweighting extends to all vehicle components, including wiring harnesses. Manufacturers are actively exploring ways to design and produce secondary wiring harnesses that are lighter and more space-efficient while maintaining the required levels of performance, safety, and durability.

Achieving lightweight and compact designs necessitates the use of advanced materials and manufacturing techniques. Lightweight materials can reduce the overall weight of the harness, contributing to fuel efficiency and reduced emissions. Manufacturers are also exploring innovative methods for harness design, such as flat or flexible wiring solutions, to optimize space utilization within vehicles.

### Sustainability and Environmental Concerns

Sustainability and environmental considerations are increasingly shaping the automotive industry, including the secondary wiring harness market. Manufacturers are under pressure to adopt eco-friendly practices, explore recyclable materials, and minimize the ecological footprint associated with harness production and disposal.

Sustainable practices encompass the use of recyclable materials in harness construction, eco-conscious design principles, and responsible disposal or recycling of harnesses at the end of their lifecycle. Manufacturers are investing in research and development to identify sustainable materials and manufacturing processes that align with evolving environmental standards. This trend reflects a growing awareness of environmental responsibility within the automotive sector.

### Quality and Reliability Standards

Ensuring the quality and reliability of automotive secondary wiring harnesses remains a key trend in the market. These harnesses are critical components that influence vehicle safety, functionality, and performance. Manufacturers must adhere to stringent quality

control processes, including extensive testing, to identify and rectify defects in harnesses.

Tests for electrical continuity, insulation resistance, resistance to environmental factors (such as heat, humidity, and vibrations), and durability are essential to meet industry standards and customer expectations. The pursuit of high-quality and reliable harnesses is a continuous trend, reflecting the automotive industry's commitment to safety and dependability.

### Technological Advancements

Technological advancements are driving innovation within the automotive secondary wiring harness market. Rapid technological changes can lead to the obsolescence of existing harness designs and materials, necessitating frequent updates and redesigns.

Manufacturers are investing in research and development to keep pace with emerging technologies, such as advanced materials, connectors, and wiring solutions.

Additionally, harnesses must adapt to accommodate new vehicle technologies, including those related to autonomous driving, connectivity, and electrification. Staying at the forefront of technological advancements is essential for remaining competitive in the market.

### Integration and Compatibility

As vehicles become more interconnected and feature-rich, the trend of ensuring seamless integration and compatibility between secondary wiring harnesses and various electronic components is gaining prominence. Wiring harnesses must be designed to accommodate the diverse array of connectors, sensors, and modules found in modern vehicles.

Ensuring that harnesses can interface with different electronic architectures and vehicle platforms is crucial. Compatibility issues can lead to system malfunctions, software errors, and vehicle recalls, which can have reputational and financial consequences for both automakers and harness suppliers. This trend emphasizes the importance of standardized interfaces and communication protocols within the automotive industry.

### Autonomous Driving Systems

The development and deployment of autonomous or self-driving vehicles represents a

significant trend with implications for the secondary wiring harness market. Autonomous vehicles rely on a multitude of sensors, cameras, LiDAR systems, radar, and intricate electronics to navigate and operate safely.

Secondary wiring harnesses play a pivotal role in providing the necessary connectivity and power distribution for these components. LiDAR and radar systems, for example, require precise data transmission to detect and respond to the vehicle's surroundings in real-time. As autonomous driving technology advances, the demand for advanced and sophisticated secondary wiring harnesses capable of supporting intricate sensor networks is expected to grow.

### Supply Chain Optimization

In response to supply chain disruptions and increasing demand for efficiency, there is a trend towards optimizing the supply chain within the automotive secondary wiring harness market. Manufacturers are exploring strategies to mitigate supply chain risks and improve responsiveness to customer needs.

This trend includes diversifying sourcing options, building inventory buffers, and developing contingency plans for unforeseen disruptions. By streamlining the supply chain, manufacturers aim to enhance their ability to meet customer demand, reduce lead times, and minimize disruptions caused by external factors.

### Talent and Skills Development

The automotive industry, including the secondary wiring harness market, faces a shortage of skilled labor and engineering talent. There is a growing need for engineers and technicians with expertise in harness design, testing, and manufacturing.

Companies are investing in talent development programs, training initiatives, and partnerships with educational institutions to attract and retain top talent. Developing a skilled workforce is crucial for addressing the skills gap and ensuring the continued innovation and competitiveness of the secondary wiring harness market.

### Segmental Insights

#### Vehicle Type Insights

In the global Automotive Secondary Wiring Harness market, distinct vehicle types play a

key role in shaping the industry trends. Passenger cars, in particular, have emerged as a significant segment owing to the complex wiring systems they incorporate for a variety of applications, ranging from safety features to infotainment systems. On the other hand, commercial vehicles are also not far behind, as the integration of advanced technologies necessitates the use of sophisticated wiring harnesses to maintain system efficiency. As the demand for electric vehicles rises, a shift in focus towards the development of compatible wiring systems is anticipated, further propelling market growth in this segment.

### Application Type Insights

Based on the type of application, the automotive secondary wiring harness market can be further segmented into various categories including the engine harness, cabin harness, door harness, airbag harness, and electronic parking brakes. The engine harness plays a crucial role in connecting and coordinating various electronic components within the engine system, ensuring optimal performance and efficiency. It facilitates the seamless communication between the engine control unit (ECU), sensors, actuators, and other vital components, enabling precise control and monitoring of the engine's functions. On the other hand, the cabin harness is responsible for powering and controlling a range of in-car features and systems. This includes the infotainment system, air conditioning, lighting, and various comfort-related functionalities. The cabin harness ensures the smooth functioning and integration of these features, enhancing the overall driving experience and convenience for the occupants. With the ongoing trend of vehicle electrification and the increasing integration of advanced safety features, the demand for secondary wiring harnesses in the automotive industry is expected to witness significant growth. These harnesses play a critical role in providing reliable electrical connections, efficient power distribution, and effective communication between different vehicle systems, thereby supporting the overall performance, safety, and functionality of modern automobiles.

### Regional Insights

The global Automotive Secondary Wiring Harness market exhibits significant geographical variations, as regional automotive industries vary in terms of maturity and technological adaptations. In North America, the market is primarily driven by the increasing demand for advanced safety features and fuel-efficient vehicles, as consumers prioritize enhanced vehicle performance and environmental sustainability. Europe, known for its stringent regulations on vehicle emissions, is actively promoting the development of lightweight and efficient wiring harness systems to meet the strict

compliance standards. The Asia-Pacific region, particularly China and India, is witnessing a remarkable surge in the automotive sector, fueled by the rapid growth of the middle-class population and urbanization. This demographic shift has resulted in an increased demand for automobiles, consequently driving the growth of the wiring harness market in the region. However, in regions like Africa and the Middle East, the market growth is relatively slower, primarily due to less technological advancement and lower vehicle production rates. The automotive industry in these regions is still in its nascent stages, with limited investments and infrastructure development, which impacts the overall demand for automotive secondary wiring harnesses.

### Key Market Players

Aptiv PLC

Yazaki Corporation

Furukawa Electric Co. Ltd.

THB Group

Spark Minda, Nexans

Samvardhana Motherson Group

Leoni AG

Sumitomo Electric Industries Ltd.

Lear Corporation

Ashok Minda Group

### Report Scope:

In this report, the Global Automotive Secondary Wiring Harness Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Automotive Secondary Wiring Harness Market, By Vehicle Type:

ICE

EV

Automotive Secondary Wiring Harness Market, By Application Type:

Cabin

Door Harness

Engine Harness

Airbag Harness

Electronic Parking Brakes

Electronic Gear Shift System

Automotive Secondary Wiring Harness Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE



## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Secondary Wiring Harness Market.

## Available Customizations:

Global Automotive Secondary Wiring Harness Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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